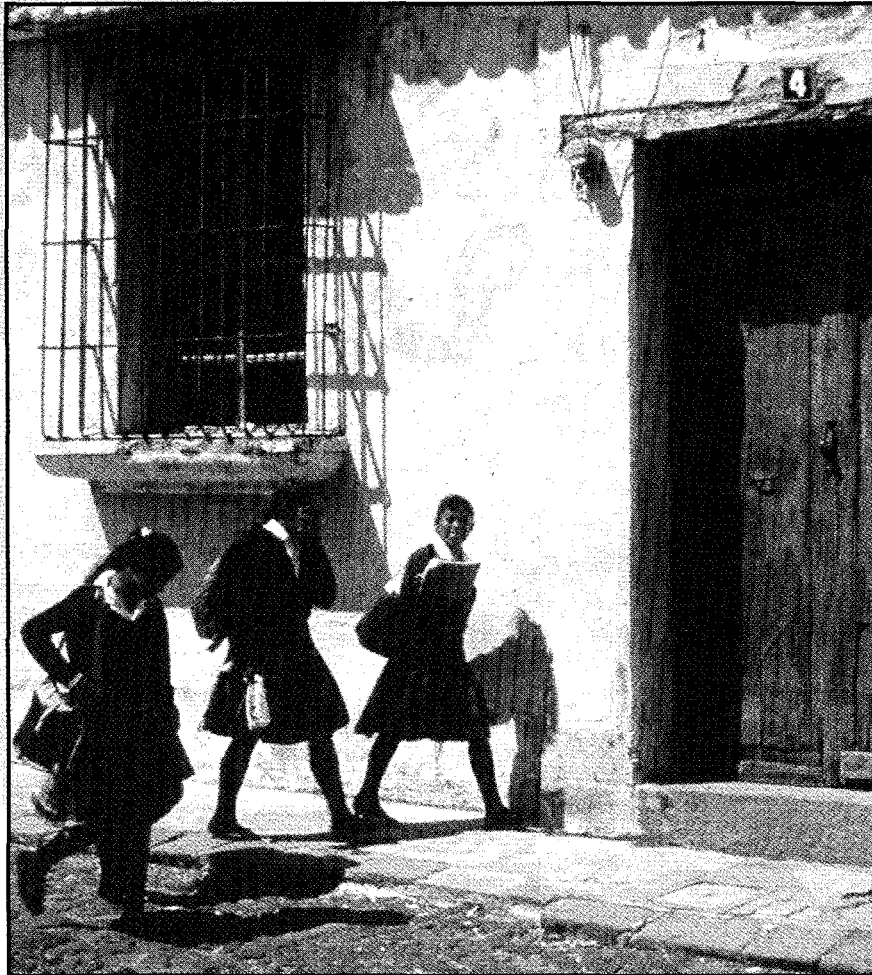


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Gender Issues in World Bank Lending



Josette L. Murphy



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A World Bank Operations Evaluation Study

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Gender Issues in World Bank Lending



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Foreword

Growing recognition of women's critical economic and societal roles has led to a worldwide focus on gender issues. Gender-based obstacles to effective participation in development must be overcome in order to reduce poverty, increase productivity and economic efficiency, decrease population growth, and preserve the environment.

This OED overview looks at the Bank's record of incorporating gender issues in the operations it supports. It finds that after extended debate and experimentation, many of the prerequisites for a full integration of gender issues in Bank lending are now in place. In particular, a formal policy directive on gender, issued in 1994, provides a sound framework for the Bank's gender initiatives.

The importance of appropriate country and sector enabling environments has prompted fresh efforts to cover gender in discussions of country strategies, to identify relevant gender issues at the earliest phase of project identification, and to provide task managers

with technical support and training adapted to regional concerns. Moreover, projects now focus on women's productive as well as their reproductive roles, and search out new opportunities to enhance women's access to employment and vital services.

Thus, significant progress has been made. But there is still a gap between objectives and achievements. Within the Bank, the financial and intellectual commitment to gender issues has been mixed; in borrower countries, women's roles are often culturally defined, and changes are undertaken cautiously. The continuing challenge is to overcome these constraints—by incorporating gender issues in dialogue with member countries, and by securing intensified managerial commitment as well as appropriate resources and incentives.

Robert Picciotto
Director General
Operations Evaluation

Prefacio

El reconocimiento creciente de la decisiva función económica y social que desempeña la mujer ha despertado el interés a escala mundial por los problemas referentes a la diferencia entre sexos. Con el fin de mitigar la pobreza, incrementar la productividad y la eficiencia económica, reducir el crecimiento de la población y conservar el medio ambiente, es necesario superar los obstáculos ligados al sexo de los participantes, lo que estorba su contribución eficaz al proceso de desarrollo.

En el presente documento de exposición general del DEO se examinan los antecedentes del Banco con respecto a la incorporación de dichos problemas a las operaciones que respalda. Se llega a la conclusión de que, tras un amplio proceso de debates y experimentación, se dan ya muchos de los prerrequisitos necesarios para la plena integración de los mismos en las operaciones crediticias del Banco. En especial, en 1994 se ha promulgado una directriz oficial de política operacional que proporciona un marco sólido a las iniciativas del Banco en esta materia.

La importancia de un contexto propicio en los distintos países y sectores ha impulsado nuevos esfuerzos encaminados a incluir el tema de la diferencia entre sexos en el debate

de las estrategias de asistencia a los países, a detectar problemas de esa índole en la fase inicial de identificación de los proyectos, y a proporcionar a los jefes de proyecto respaldo y capacitación técnicos adaptados a los problemas regionales. Además, en los proyectos se presta ahora especial atención a las funciones de la mujer, no sólo reproductivas, sino también productivas, y se buscan nuevas oportunidades de ampliar el acceso de las mujeres al empleo y los servicios vitales.

Se han realizado, por tanto, progresos significativos. Sin embargo, hay todavía una gran discrepancia entre los objetivos y los logros. En el Banco, la dedicación de recursos financieros e intelectuales al tema de la función del hombre y la mujer ha sido desigual; en los países prestatarios, la función de la mujer está a menudo definida culturalmente, y los cambios se adoptan con cautela. Se plantea el reto permanente de superar dichas limitaciones incorporando esas cuestiones al diálogo con los países miembros y garantizando un mayor compromiso de la administración, así como los recursos e incentivos necesarios.

Robert Picciotto
Director General
Evaluación de Operaciones

Préface

La reconnaissance de plus en plus large du rôle essentiel joué par les femmes dans l'économie et la société a conduit le monde entier à se pencher sur la problématique hommes/femmes. Afin de lutter contre la pauvreté, d'accroître la productivité et l'efficacité économiques, de ralentir la croissance démographique et de protéger l'environnement, il faut surmonter les obstacles liés au sexe qui s'opposent à une participation effective au développement.

La présente étude de l'OED dresse un bilan des efforts faits par la Banque pour intégrer la problématique hommes/femmes dans les opérations qu'elle appuie. Elle constate qu'après de larges discussions et expériences, les conditions préalables à une pleine prise en compte de la problématique dans les opérations de prêt de la Banque sont maintenant réunies. Ainsi, une directive adoptée l'an passé sur la question fournit un bon cadre pour les initiatives de la Banque en la matière.

L'importance d'un environnement national et sectoriel favorable a porté les responsables à redoubler d'efforts pour inclure la question dans la discussion des stratégies-

pays, pour repérer les problèmes qui s'y rapportent au premier stade de l'identification du projet et pour assurer aux chefs du projet la formation et l'appui technique les mieux adaptés à la région. Par ailleurs, les projets touchent à présent au rôle productif et reproductif de la femme; ils cherchent de nouveaux moyens d'élargir l'accès des femmes à l'emploi et aux services vitaux.

Si d'importants progrès ont été accomplis, il y a toujours un décalage entre les objectifs et les résultats. A la Banque même, l'engagement financier et intellectuel en la matière est inégal; dans les pays emprunteurs, le rôle des femmes est souvent culturellement défini et les changements ne sont entrepris qu'avec prudence. Le problème qui se pose encore et toujours est de supprimer les contraintes — en évoquant la question dans les discussions avec les pays membres, en obtenant l'adhésion des responsables ainsi que les ressources et mesures d'incitation appropriées.

Robert Picciotto
Directeur général
Evaluation des opérations

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Special thanks are extended to the steering group and members of the Bankwide gender and poverty network, who contributed information and insights throughout the study process. The topic sparked the interest of staff in Archives, the Joint Bank/Fund and Sectoral libraries, the Staff Association, the 1818 Society, and in the offices of the executive directors. All conducted searches beyond what is usually expected. The anonymity of the many staff, managers, and

retirees who gave their time for extensive interviews must be preserved, but the team would like to thank them for the stimulating and informative sessions.

The study team was coordinated by Josette Murphy (Task Manager), and included researchers William Battaile (data analysis) and Varsha Malhotra (project reviews). Carla Sarmiento provided administrative support.

Abbreviations and acronyms

AF1	Occidental and Central Africa Department, Africa Region
AF3	South-Central and Indian Ocean Department, Africa Region
AF6	Southern Africa Department, Africa Region
AFTAG	Africa Technical Department, Agriculture Division
CAS	Country assistance strategy paper
CD	Country department
CEM	Country economic memorandum
EA1	Country Department I, East Asia and Pacific Region
EA3	Country Department III, East Asia and Pacific Region
EAP	East Asia and Pacific Regional Office
ECA	Europe and Central Asia Regional Office
ENV	Environment Department
ESP	Education and Social Policy Department
ESW	Economic and sector work
FY	Fiscal year
GAP	Gender Analysis and Policy Team
HRO	Human Resources Development and Operations Policy Vice Presidency
IBRD	International Bank for Reconstruction and Development
IDA	International Development Agency
LA3	Country Department III, Latin America and the Caribbean Region
LAC	Latin American and the Caribbean Regional Office
MIS	Management information system
MN2	Country Department II, Middle East and North Africa Region
MNA	Middle East and North Africa Regional Office
MOP	Memorandum to the President
NGO	Nongovernmental organizations
OD	Operational directive
OED	Operations Evaluation Department
OMS	Operational manual statement
OP	Operational policy
OPR	Operations Policy Department
PAR	Performance audit report
PCR	Project completion report

PHN	Population, Health and Nutrition Sector
PHRWD	Women in Development Division, Population and Human Resources Department
PN	Policy notes
POC	Program objective category
SA2	Country Department II, South Asia Region
SAR	Staff appraisal report
WID	Women in development

Executive summary

Background

Since the early 1970s, numerous case-studies, social and economic research, and evaluation reports have documented how women as well as men contribute to the development of their country. They have also measured the deleterious effects of projects that ignored differences in gender roles in a given setting. A series of international conferences sponsored by the United Nations served to highlight the relevance of gender issues for borrowing countries and development agencies.

Early efforts to bring out the 'invisible' women in Bank-funded projects established some basic principles still found relevant in the current policy. But progress in moving from rhetoric to action remained slow until the mid-1980s, when increased management support and resources made it possible to implement a more comprehensive program. This evolution has been largely forgotten within the Bank, yet it provides lessons relevant for the implementation of the policy paper and operational policy on gender approved in April 1994.

This report examines the evolution of Bank strategy to integrate gender issues in Bank lending across sectors since 1967, and the outcomes achieved so far. It reconstructs the evolution of Bank thought and actions in

some depth through archives, published documents, and interviews. It describes the characteristics of 615 projects with some gender-related action, discusses the implementation experience through detailed file reviews for 60 of these projects, and assesses the outcomes for those projects already completed. With two-thirds of projects containing gender-related action still in progress, the assessment is, of necessity, provisional. Subsequent reports by the Operations Evaluation Department will provide detailed assessments of recent approaches as projects are completed. This desk review does not attempt to measure the impact of Bank lending on women.

Findings

Evolution of concepts and institutional setting. Throughout the 1970s and early 1980s, the efforts of some staff members and participation in international United Nations conferences during the International Decade for Women led the Bank to recognize the relevance of gender issues for poverty alleviation and economic growth; establish a position of advisor on women in development; discuss the roles of women in Bank statements, reports and guidelines; and begin to provide staff with operational support and information.

Some principles recognized early on included the relevance of attention to women for poverty alleviation and economic growth, on grounds of improved efficiency and equity; the autonomy of member countries on culturally sensitive issues; and the desirability of focusing on sectors with the greatest pay-offs through mainstream projects, rather than projects with only women as beneficiaries. These principles were not fully documented at the time, and sparse resources and uneven management support kept implementation at a low level.

In the second half of the 1980s, conceptual, institutional and operational changes accelerated as management took a proactive stance toward gender issues. Beginning about 1986:

- Senior management and the Board provided steady, highly visible support as well as resources (and extra pressure as necessary) for gender-related action.
- A long-term, comprehensive program of operational support and research was agreed upon by Women in Development staff and operations management.
- Resources earmarked for gender issues in Bank budget and trust funds greatly increased.
- A core of specialized staff was established, first in a central unit, then in the regions.
- A program of countrywide assessments of gender issues was undertaken as a basis for policy discussions with member countries regarding future projects.
- Monitoring and periodic progress reporting helped focus the discussions between the Bank and the Board.

Evolution of the portfolio. Gender-related actions were specified in at least 615 of the 4,955 investment projects approved during FY67-93. Over half of these 615 projects were approved during FY89-93. Attention to gender was clearly associated with poverty and human resources development, with ninety-three percent of the 615 projects found in low-income and lower middle-income countries. Over two-thirds (410 projects) were funded through the International Development Association. The largest number of projects with gender-related action were found in the Africa (41 percent), South Asia, and Latin America and the Caribbean Regions (15 percent each). Human resources projects formed the largest sector (46 percent), followed by agriculture projects (39 percent). The sources of funding and the portfolio distribution across regions and sectors changed little over time, although the sectoral distribution was more diversified in projects approved recently.

Portfolio outcomes. In most cases, gender-related activities formed a relatively small part of the project, yet they were subject to the same implementation difficulties as any other component. Furthermore, the high number of area development projects among projects with gender-related action designed from FY67 to FY84 lowered overall performance of all projects with gender-related actions. It is not surprising therefore that no clear difference in overall outcomes could be established for projects with and without gender-related activity in the 196 projects completed so far.

The following conditions were found associated with satisfactory achievement of gender-related actions:

- Country involvement and commitment to gender-related actions and the project as a whole.

- The clear integration of gender-related objectives with overall project objectives.
- Presence of staff with gender experience.
- Supervision attention to gender action.

Country-level assessments of gender issues.

Countrywide assessments of gender issues were done in 72 countries. In some countries, the process of conducting such an assessment encouraged a constructive dialogue with the borrowers and strengthened their commitment to gender issues. It also increased interactions between staff experienced with gender issues and task managers, and led to interactions across sectoral divisions.

Recent developments. Some recent developments are encouraging:

- The approval of a policy paper and an operational policy in April 1994 gave full legitimacy to gender-related strategies.
- In some countries, there is preliminary evidence that the preparation of country-wide gender assessments helped strengthen borrowers' commitment to address gender issues, and led to more systematic integration of these issues in project identification and design.
- Research findings have demonstrated, and in some cases quantified, the benefits from addressing gender issues.
- Operational support adapted to regional priorities is provided by specialized staff in the technical departments and in some country departments, as well as in central vice presidencies.
- Participatory approaches and social assessments in Bank sector and project

work are being promoted; this should help increase attention to gender issues.

Through the 1970s and 1980s, the Bank kept a cautious stance on a subject that continued to be called new, complex, and sensitive. Gender issues are complex and culturally defined. Interventions that could entail changes in gender roles are therefore sensitive. Yet such changes often occur spontaneously and quickly, as economic and technological conditions evolve. Many prerequisites for a full integration of gender issues in Bank lending are now in place: a clear policy on the subject, strong support from the Board and many senior managers, well documented research findings, dedicated staff at the central and regional levels, and a marked increase in the availability of information on women's roles at the country level, including in economies in transition. The focus can now be on developing the subject further within the Bank's dialogue with member countries, and on implementing the Bank's policy paper and operational policy. But this will require continued commitment and appropriate resources and incentives.

Suggestions and recommendations

To maintain the current momentum, evidence of strong support by every level of management and the Board will be essential. Sufficient resources and regular progress monitoring will also be necessary. Recent management support for promoting participatory approaches and conducting social assessments should help make gender issues more visible. During FY95, a \$2 million Fund for Innovative Approaches in Human and Social Development will be managed by the Operations Policy Department in consultation with the Environment Department.¹ Since gender issues are a core element of

human and social development, actions that address them are appropriate for support from this Fund.

Country strategy. Statements on gender issues in the country assistance strategy paper are inevitably brief. For such a statement to help ensure that the borrower and sectoral staff agree on issues and priorities, it must be the product of ongoing discussions among the borrower, the country team, and the department management team. Given the diversity in member countries and in gender work by country departments, the steps leading to the preparation of the country assistance strategy paper statement inevitably vary. Where work in a country is not sufficiently developed to support a meaningful country assistance strategy paper statement, involvement of staff with gender experience in country assistance strategy paper preparation or in reviews of the portfolio, and in discussions with the borrower, may prove useful in increasing understanding of gender issues at the country level and in strengthening the dialogue with borrowers. This could take place during a country implementation review, a special workshop (or meeting of the consortium of development agencies), or an assessment of gender issues at the country level. Each country department should assess which, if any, of these steps would be useful. The operational directive already stipulates that implementation of country strategy on gender will be monitored during country implementation reviews.

Gender-related actions are more likely to be implemented if borrower staff fully support them and are committed to making them successful. The process of discussing gender issues at the country and sector level may help inform and convince project staff of the gender actions' relevance for successful implementation. Other steps could include

the involvement of gender specialists during implementation, and participation in seminars organized for the borrower and Bank staff by the Economic Development Institute.

Project design and implementation. Gender-related actions are more likely to be implemented if they are part of a broader social and economic analysis, and if they are well integrated into project objectives. Social Assessment Guidelines provide guidance for early integration of social issues in project design. Managers should ensure that staff use these guidelines, and that the terms of reference for sector and operations work include explicit questions on gender issues whenever these issues are likely to be relevant.

Supervision of gender-related actions was weak in early projects, and remained uneven in projects now nearing completion. Yet attention to gender-related actions during supervision contributes to their satisfactory implementation. Steps found useful to improve supervision include the involvement of staff experienced with gender issues in appraisal or early supervision, and thematic supervision for selected projects in one sector or one area.

To provide project managers, country planners, and the Bank with the information needed for successful implementation, progress indicators should measure outcomes on men and women separately whenever appropriate; midterm reviews should assess progress on gender-related actions; and implementation completion reports should include gender-differentiated results in the lessons learned.

Technical support. To provide task managers with appropriate support, and ensure that projects with gender dimensions are well

prepared, gender teams in several regions established a systematic review of initial executive project summaries. The experience so far has been positive and these reviews are expected to continue. In the words of a task manager, it is essential "to put gender issues in [the task manager's] critical path." The study identified several cases where task managers modified their behavior after having worked in the field with persons experienced in gender issues. This on-the-job training should be encouraged. The program now being initiated by the Gender Analysis and Policy team is expected to provide task managers with practical guidance through training sessions defined jointly with individual regions, and through the preparation of brief summaries of issues and operational examples. Gender issues should also continue to be integrated in sector training as appropriate.

Ex post evaluations. The Operations Evaluation Department should look for lessons on gender issues when selecting projects for audits, impact evaluations, and country studies. Questions on differential gender effects and impact should be included in their terms of reference. The Bank's experience with projects focused exclusively on women should be assessed once the current projects are completed.

Research. When the Women in Development Division, Population and Human Resources Department, initiated a research program on gender issues, it was with the explicit intent to demonstrate to Bank staff the validity and relevance of those issues for their work. While the program took longer to implement than expected, it did produce some

high quality work that caught the attention of staff and management. Further research needs are likely to vary across regions.

The history of gender in Bank lending shows how an institution organized by sectors and geography integrated an issue affecting its work in many sectors. Networking and grassroots interest by staff were not sufficient to bring about structural and policy changes. Outside pressure, too, was useful but did not play a determining role. Strong management support, reiterated often and accompanied by financial support, was needed to establish a new program. Bank funds were eventually supplemented by outside funds. Attention to cross-sectoral issues throughout economic and sector work and the portfolio required that a sufficient number of staff be dedicated to these issues to handle the work, both in central vice presidencies and in the regions.

Further analysis will be required to better understand the factors that influence borrowers' decisions to address gender issues in development planning. The apparent increase in attention to gender in projects prepared in a participatory manner should also be reviewed.

Note

1. Memorandum from Operations Policy Department acting director to Central and Operations managers, June 1, 1994. The funds are available to regional and central vice presidencies for "innovative approaches in human and social development" that improve the quality of Bank operations, and particularly for innovative approaches for promoting the participation of stakeholders in planning and implementing development projects, and for undertaking social assessments.

Resumen

Antecedentes

Desde los primeros años de la década de los setenta, numerosos estudios de casos, investigaciones sociales y económicas e informes de evaluación han documentado cómo la mujer puede contribuir, al igual que el hombre, al desarrollo de sus países. Al mismo tiempo, han cuantificado los perniciosos efectos de los proyectos que no han tenido en cuenta las diferencias en las funciones del hombre y la mujer en un determinado contexto. Una serie de conferencias internacionales patrocinadas por las Naciones Unidas contribuyó a poner de relieve la importancia de los problemas relacionados con la diferencia entre sexos tanto para los países prestatarios como para los organismos de desarrollo.

En los proyectos respaldados por el Banco, los primeros intentos de sacar del anonimato a las mujeres "invisibles" se plasmaron en unos principios básicos que continúan siendo todavía válidos en la política actual. No obstante, en el intento de pasar de las palabras a la acción no se avanzó demasiado hasta mitad de los años ochenta, en que la intensificación del apoyo administrativo y el mayor volumen de recursos permitieron poner en práctica un programa más ambicioso. Esta evolución, olvidada en gran parte dentro del Banco, contiene todavía algunas enseñanzas interesantes para la aplicación

del documento de política y la política de operaciones relativa a los problemas derivados de la diferencia entre sexos, aprobados en abril de 1994.

En el presente informe se examinan la evolución de la estrategia del Banco encaminada a integrar estos problemas en sus operaciones crediticias en los distintos sectores desde 1967 y los resultados conseguidos hasta ahora. Utilizando datos de los archivos, publicaciones y entrevistas se reconstruye con cierto detalle la evolución de la mentalidad y actuación del Banco. Se describen las características de 615 proyectos con algún tipo de acción relacionado con las diferencias hombre-mujer, se analizan las modalidades de ejecución mediante el examen detallado de archivos correspondientes a 60 de estos proyectos y se evalúan los resultados de los proyectos ya terminados. Las dos terceras partes de los proyectos con iniciativas de esta índole están todavía en fase de ejecución, por lo que todo intento de evaluación es necesariamente provisional. En posteriores informes del Departamento de Evaluación de Operaciones se ofrecerán evaluaciones detalladas de los planteamientos recientes, a medida que se vayan concluyendo los proyectos. No es objetivo del presente estudio cuantificar el impacto de las operaciones crediticias del Banco en la situación de la mujer.

Conclusiones

Evolución de los conceptos y del marco institucional. A lo largo de los años setenta y primeros ochenta, los esfuerzos de algunos funcionarios y la participación en conferencias internacionales de las Naciones Unidas durante el Decenio Internacional para la Mujer llevaron al Banco a reconocer la importancia de estos problemas para la mitigación de la pobreza y el crecimiento económico; a establecer un cargo de asesor sobre la participación de la mujer en el proceso de desarrollo; a examinar el lugar ocupado por la mujer en las declaraciones, informes y directrices del Banco, y a comenzar a ofrecer al personal información y apoyo práctico.

Entre los principios reconocidos inicialmente figuraba la necesidad de considerar a la mujer en los intentos encaminados a la mitigación de la pobreza y el crecimiento económico, por razones de eficiencia y de equidad; la autonomía de los países miembros en los temas culturales especialmente delicados, y la conveniencia de concentrarse en los sectores con mayor rentabilidad mediante proyectos de alcance general, es decir, no orientados exclusivamente a la mujer. Estos principios no se documentaron plenamente en su momento, lo que, unido a la escasez de recursos y a la irregularidad del apoyo administrativo, impidió una aplicación eficaz.

En la segunda mitad de los años ochenta, los cambios conceptuales, institucionales y orgánicos se aceleraron conforme la administración adoptó una actitud más dinámica en relación con estos problemas. A partir de 1986, aproximadamente, se observaron las siguientes innovaciones:

- La administración superior y el Directorio prestaron apoyo constante y mani-

fiesto así como recursos (con presión adicional, en caso necesario) a las iniciativas relacionadas con estos problemas.

- La administración de operaciones y el personal de Participación de la Mujer en el Proceso de Desarrollo aprobaron de mutuo acuerdo un programa global a largo plazo de apoyo práctico e investigación.
- En el presupuesto del Banco se asignaron recursos a los problemas relacionados con la diferencia entre sexos y se incrementaron notablemente los fondos fiduciarios.
- Se estableció un núcleo de personal especializado, primero en la dependencia central y luego en las regiones.
- Se emprendió un programa de evaluaciones de alcance nacional sobre estos problemas como base para las conversaciones sobre políticas con los países miembros en relación con proyectos futuros.
- El seguimiento y la presentación periódica de informes sobre actividades contribuyeron a delimitar los debates entre el Banco y el Directorio.

Evolución de la cartera. Las iniciativas relacionadas con la diferencia entre sexos se especifican al menos en 615 de los 4.955 proyectos de inversión aprobados durante los ejercicios comprendidos entre 1967 y 1993. Más de la mitad de estos 615 proyectos se aprobaron en el período de 1989-93. La atención a esta problemática estaba claramente asociada a la lucha contra la pobreza y el perfeccionamiento de los recursos humanos, ya que el 93 por ciento de esos 615 proyectos se realizaron en países de ingreso bajo y mediano bajo. Más

de dos tercios (410 proyectos) se financiaron a través de la Asociación Internacional de Fomento. Entre los que contenían iniciativas de esta índole, el mayor número correspondió a África (41 por ciento), Asia meridional y América Latina y el Caribe (15 por ciento en uno y otro caso). Los proyectos sobre recursos humanos constituyeron el sector más numeroso (46 por ciento), seguidos de los relativos a la agricultura (39 por ciento). Las fuentes de financiamiento y la distribución de la cartera entre regiones y sectores cambió poco a lo largo del tiempo, aunque la distribución sectorial era más diversificada en los proyectos de aprobación reciente.

Resultados de la cartera. En la mayor parte de los casos, las actividades relacionadas con la diferencia entre sexos constituía una parte relativamente pequeña del proyecto, pero tropezaron con las mismas dificultades de ejecución que cualquier otro componente. Además, el elevado número de proyectos de desarrollo subregional entre los formulados de 1967 a 1984 que contemplaban las cuestiones relacionadas con la función de las mujeres y los hombres redujo el rendimiento general de todos los proyectos de este tipo. Por ello, no es de extrañar que no se pudiera establecer ninguna diferencia clara en los resultados globales de los proyectos con y sin este componente en los 196 ya terminados.

Según las comprobaciones efectuadas, las condiciones asociadas a resultados satisfactorios de las acciones relacionadas con la diferencia hombre-mujer eran las siguientes:

- Participación y compromiso del país con estas iniciativas y con el proyecto en general.
 - Clara integración de estos objetivos en los generales del proyecto.
 - Presencia de personal con experiencia en este tipo de actividad.
 - Supervisión de las actividades relacionadas con la función de las mujeres y los hombres.
- Evaluaciones nacionales sobre las cuestiones referidas al papel de cada sexo.* En 72 países se habían efectuado evaluaciones de alcance nacional sobre estos problemas. En algunos de ellos, el mismo proceso de evaluación alentó un diálogo constructivo con los prestatarios e intensificó su interés por estos problemas. Además, se intensificaron las relaciones entre personal experimentado en este sentido y los jefes de proyectos, lo que fomentó los contactos entre las divisiones sectoriales.
- Evolución reciente.* Algunos acontecimientos recientes resultan alentadores:
- La aprobación de un documento de política y de una política de operaciones en abril de 1994 representó la total legitimación de las estrategias relacionadas con las diferencias hombre-mujer.
 - En algunos países, hay pruebas iniciales de que la preparación de evaluaciones nacionales sobre la diferencia entre sexos contribuyó a intensificar el empeño de los prestatarios en abordar estos problemas y permitió una integración más sistemática de los mismos en la identificación y diseño de los proyectos.
 - Los resultados de las investigaciones han demostrado, y en algunos casos cuantificado, los beneficios conseguidos con estas iniciativas.
 - El personal especializado de los departamentos técnicos y de algunos departamentos geográficos, así como de las

vicepresidencias centrales, presta apoyo práctico adaptado a las prioridades regionales.

- Se están promoviendo los planteamientos basados en la participación y las evaluaciones sociales en la labor del Banco relacionada con los sectores y los proyectos, lo que debería contribuir a intensificar la atención a los problemas de la diferencia entre sexos.

A lo largo de los años setenta y ochenta el Banco mantuvo una actitud de cautela ante un tema que seguía considerándose como nuevo, complejo y delicado. Efectivamente, estos problemas son complejos y dependen de factores culturales. Por ello, toda intervención que pudiera implicar cambios en las funciones de uno y otro sexo es delicada. Por otro lado, estos cambios se producen de forma espontánea y con rapidez cuando cambian las condiciones económicas y tecnológicas. Muchos de los requisitos para la plena integración de estos problemas en las actividades crediticias del Banco son ya una realidad: una política clara al respecto, el fuerte apoyo del Directorio y de muchos directivos superiores, investigaciones claramente documentadas, personal central y regional empeñado en esta causa y un fuerte crecimiento de la disponibilidad de información sobre la función de la mujer en los países, incluidas las economías en transición. La atención podría orientarse ahora a profundizar este tema en el diálogo del Banco con los países miembros y a poner en práctica el documento sobre política y la política de operaciones del Banco. Pero para ello se requiere un empeño constante y recursos e incentivos suficientes.

Sugerencias y recomendaciones

A fin de mantener el impulso actual, será fundamental que haya constancia de una

colaboración decidida por parte del Directorio y de todos los niveles de la administración. También será necesario que existan recursos suficientes y que se supervisen periódicamente los progresos realizados. El apoyo que la administración ha prestado recientemente al fomento de los enfoques participativos y a la realización de evaluaciones sociales deberá contribuir a dar mayor relieve a las cuestiones relativas a la función de la mujer y el hombre en el proceso de desarrollo. Durante el ejercicio de 1995, el Departamento de Políticas de Operaciones administrará, en consulta con el Departamento del Medio Ambiente, el Fondo para métodos innovadores de perfeccionamiento de los recursos humanos y desarrollo social, de US\$2 millones¹. Dado que las cuestiones relativas a la función de la mujer y el hombre constituyen un elemento básico del perfeccionamiento de los recursos humanos y el desarrollo social, se puede recurrir a este Fondo para respaldar medidas que abordan dichas cuestiones.

Estrategia de asistencia a los países. Resulta inevitable que las declaraciones sobre cuestiones relativas a las funciones de cada sexo que figuran en el documento de estrategia de asistencia a un país sean breves. Para que aquellas favorezcan el acuerdo del prestatario y el personal de los departamentos sectoriales sobre los problemas y las prioridades, deben ser producto de conversaciones continuas entre el prestatario, el grupo a cargo del país y el grupo de administración departamental. Dada la variedad de países miembros y de los estudios de los departamentos geográficos en torno a cuestiones relativas a la función del hombre y la mujer, es inevitable que los preparativos que llevan a la formulación de las mencionadas declaraciones no siempre coincidan. Cuando los estudios sobre un país no están suficientemente desarrollados para respaldar una declaración bien

fundada en el documento de estrategia de asistencia, la participación de personal con experiencia en cuestiones referidas al papel de cada sexo en la preparación de este tipo de documentos o en exámenes de la cartera, así como en las conversaciones con el prestatario, puede resultar útil para incrementar la comprensión de dichas cuestiones a nivel del país y para reforzar el diálogo con los prestatarios. Esto podría tener lugar durante un examen de la ejecución de proyectos en el país, durante un seminario especial (o reunión del consorcio de organismos de fomento), o en una evaluación de cuestiones relacionadas con la función de los dos sexos a nivel del país. Cada departamento geográfico debe evaluar cuál de estas opciones resultaría útil en su caso. En la directriz operacional se establece que la ejecución de la estrategia para un país en lo que respecta a la función de las mujeres y los hombres se supervisará en los exámenes de la ejecución de proyectos.

Hay más probabilidades de que se apliquen las medidas relativas a la función de las mujeres y los hombres si el personal del prestatario las respalda plenamente y está firmemente decidido a hacer que tengan éxito. El proceso de examen de las cuestiones referidas a dicha función a nivel sectorial y del país puede contribuir a informar y convencer al personal que participa en los proyectos de la importancia de esas medidas para el éxito de la ejecución. También se podría recurrir a la intervención de especialistas en el papel de cada sexo durante la ejecución, y a la participación en seminarios organizados por el Instituto de Desarrollo Económico para el personal del prestatario y del Banco.

Diseño y ejecución de los proyectos. Hay más probabilidades de que se apliquen las medidas relativas a la función de las mujeres y

los hombres si están enmarcadas en un análisis social y económico más amplio y si se encuentran bien integradas en los objetivos de los proyectos. Las directrices sobre evaluación social ofrecen orientación para la integración temprana de cuestiones sociales en el diseño de los proyectos. Los gerentes deben garantizar que el personal siga estas directrices y que los parámetros de los estudios sectoriales y de operaciones incluyan interrogantes explícitos sobre cuestiones relativas a la función del hombre y la mujer siempre que exista la probabilidad de que tales cuestiones sean pertinentes.

La supervisión de las medidas relativas al papel de cada sexo fue deficiente en los primeros proyectos y ha seguido siendo irregular en los que están ahora próximos a su terminación. Sin embargo, el hecho de que se preste atención a dichas medidas durante la supervisión contribuye a que se apliquen de forma satisfactoria. Para mejorar la supervisión se han considerado útiles la participación de personal con experiencia en cuestiones referidas a la función del hombre y la mujer en la evaluación inicial o en las primeras etapas de la supervisión, así como la supervisión temática para proyectos seleccionados en un sector o un área.

A fin de proporcionar a los jefes de los proyectos, a los planificadores de programas de países y al Banco la información necesaria para que la ejecución sea satisfactoria, los indicadores de los progresos realizados deben medir los resultados relativos a hombres y mujeres separadamente, cuando proceda; los exámenes generales de los proyectos a mediados del período de ejecución deben evaluar los avances en relación con las medidas referidas a la función del hombre y la mujer, y los informes finales de ejecución, al considerar las enseñanzas

aprendidas, deberían desglosar los resultados de cada sexo.

Apoyo técnico. A fin de proporcionar a los jefes de proyecto un respaldo adecuado y de garantizar la debida preparación de los proyectos que incluyen aspectos relacionados con la función de cada sexo, los grupos a cargo de ese tema en varias regiones establecieron un examen sistemático de los resúmenes iniciales de los proyectos. La experiencia ha sido positiva hasta el momento, y está previsto que estos exámenes se sigan realizando. Como reconoce uno de ellos, todo jefe de proyecto debería tener que plantearse en algún momento esta problemática. En el estudio se identificaron varios casos en los que los jefes de proyecto habían cambiado de conducta tras haber trabajado sobre el terreno con personas experimentadas en dichas cuestiones. Se debe fomentar este tipo de adiestramiento en el puesto de trabajo. Se prevé que el programa que está iniciando ahora el grupo encargado del análisis y las políticas relativos a la función de las mujeres y los hombres en el proceso de desarrollo proporcionará asesoramiento práctico a los jefes de proyecto a través de sesiones de capacitación definidas conjuntamente con cada región, así como mediante la preparación de resúmenes breves de problemas y ejemplos operativos. Asimismo, las cuestiones relacionadas con la función de las mujeres y los hombres se deben seguir incluyendo en la capacitación sectorial, según proceda.

Evaluaciones ex post. El Departamento de Evaluación de Operaciones debe buscar enseñanzas sobre las cuestiones relativas a la función de cada sexo cuando seleccione proyectos para la evaluación *ex post*, la evaluación de los efectos y los estudios sobre países. En su mandato se deben prever análisis sobre los efectos y las repercusiones, des-

glosados por sexo. La experiencia del Banco con proyectos centrados exclusivamente en la mujer se debe evaluar una vez hayan finalizado los proyectos actualmente en curso.

Investigación. Cuando la División de Participación de la Mujer en el Proceso de Desarrollo, Departamento de Población y Recursos Humanos, inició un programa de investigación sobre cuestiones relacionadas con la función de las mujeres y los hombres en el proceso de desarrollo, su propósito explícito era demostrar al personal del Banco la validez y pertinencia de tales cuestiones para su trabajo. Si bien la ejecución del programa llevó más tiempo del previsto, produjo algunos estudios de gran calidad que atrajeron la atención del personal y la administración. Seguramente la necesidad de que se lleven a cabo nuevas investigaciones variará según las regiones.

La historia de las cuestiones referidas a la función del hombre y la mujer en conexión con el financiamiento del Banco muestra cómo una institución organizada por sectores y regiones ha asumido un problema que afecta a su trabajo en muchas áreas. El establecimiento de redes de comunicación y el fomento del interés a nivel popular por parte del personal no fueron suficientes para producir cambios estructurales y de las políticas. La presión externa fue, asimismo, útil, pero no desempeñó una función determinante. Se precisó un apoyo firme de la administración, reiterado frecuentemente y acompañado de respaldo financiero, para establecer un programa nuevo. Los fondos del Banco se complementaron en un momento dado con fondos externos. La atención a cuestiones multisectoriales en los estudios económicos y sectoriales y la cartera obligó a dedicar a las mismas un número suficiente de funcionarios para hacer frente al trabajo tanto en las vicepresi-

dencias centrales como en las oficinas regionales.

Harán falta más análisis para comprender mejor los factores que influyen en la decisión de los prestatarios de abordar cuestiones referidas a la función de las mujeres y los hombres en la planificación del desarrollo. También se debe examinar la mayor atención que parece estarse prestando a estas cuestiones en los proyectos preparados de forma participativa.

Nota

1. Memorando del Director Interino del Departamento de Políticas de Operaciones a los gerentes de las vicepresidencias centrales y de operaciones, 1 de junio de 1994. Los fondos están a disposición de las vicepresidencias regionales y centrales para su empleo en métodos innovadores de perfeccionamiento de los recursos humanos y desarrollo social que mejoren la calidad de las operaciones del Banco y, en especial, para su utilización en métodos innovadores destinados a fomentar la participación de las partes interesadas en la planificación y ejecución de proyectos de desarrollo, así como a la realización de evaluaciones sociales.

Résumé analytique

Généralités

Depuis le début des années 70, nombre d'études de cas, de recherches socio-économiques et de rapports d'évaluation ont montré comment hommes et femmes contribuent au développement de leur pays. Ils ont également mesuré les effets délétères des projets qui avaient ignoré cette complémentarité des rôles dans un contexte donné. Une série de conférences parrainées par les Nations Unies ont permis de souligner l'importance de la problématique hommes/femmes pour les pays emprunteurs et les organismes de développement.

Les premiers efforts qui ont été faits pour que la femme « sorte de l'ombre » dans les projets financés par la Banque ont établi certains principes de base qui demeurent valables à l'heure actuelle. Mais l'évolution de la parole aux actes a été lente et ce n'est qu'au milieu des années 80 qu'il a été possible de mettre en oeuvre un programme plus complet, grâce à des ressources et à un appui accru de la direction. Ce processus évolutif a été largement oublié à la Banque, pourtant, il permet de tirer des enseignements judicieux pour l'application du document de politique générale et de politique opérationnelle sur la problématique hommes/femmes approuvé en avril 1994.

Le présent rapport étudie comment la Banque a modifié sa stratégie pour prendre en compte les actions concernant la problématique hommes/femmes dans les projets qu'elle a financés depuis 1967, et indique les résultats obtenus jusqu'à présent. Il retrace le cheminement des idées et l'évolution des actions de la Banque à partir de documents d'archives, de publications et d'entretiens. Il décrit les caractéristiques de 615 projets dont certains éléments portent sur le rôle de la femme dans le développement, présente la mise en oeuvre de ces projets, étudie dans le détail les dossiers de 60 d'entre eux et évalue les résultats des projets achevés. Les deux tiers de ces projets sont en cours et cette évaluation est forcément provisoire. Dans ses prochains rapports, le Département de l'évaluation rétrospective des opérations fera une évaluation exhaustive des nouvelles approches au fur et à mesure de l'achèvement des projets. Cette étude ne prétend pas mesurer l'impact des concours de la Banque sur les femmes.

Conclusions

Evolution des concepts et des institutions. Du fait des efforts de certains de ses agents et de sa participation à des conférences internationales des Nations Unies pendant les années 70 et au début des années 80, au

cours de la Décennie internationale de la femme, la Banque a été amenée à reconnaître la place que tient la femme dans la lutte contre la pauvreté; à créer un poste de Conseiller sur le rôle de la femme dans le développement; à parler du rôle de la femme dans ses déclarations, rapports et directives; et à mettre un appui opérationnel et des informations à la disposition de ses services.

On a reconnu dès le départ qu'il fallait prendre en compte le rôle de la femme dans la réduction de la pauvreté et la croissance économique, pour en améliorer l'efficacité et l'équité; respecter l'autonomie des pays membres sur des questions sensibles au plan culturel; et axer autant que possible les efforts sur des secteurs obtenant les meilleurs résultats dans le cadre de projets intégrés plutôt que sur des projets dont les femmes seraient les seules bénéficiaires. Comme ces questions n'avaient pas fait alors l'objet d'études exhaustives, que les ressources étaient limitées et que la direction n'offrait pas un appui suivi, peu de projets tenant compte de ces questions ont été mis en oeuvre.

Dans la deuxième moitié des années 80, les changements conceptuels, institutionnels et opérationnels se sont accélérés alors que la direction engageait une action résolue sur la problématique hommes/femmes. A partir de 1986 environ :

- La direction et le Conseil ont apporté un appui continu et très visible aux actions définies dans le contexte de la problématique hommes/femmes en fournissant les ressources nécessaires (et en appliquant des pressions le cas échéant).
- Les services chargés du rôle de la femme dans le développement et la direction des opérations ont arrêté un programme

exhaustif de recherche et d'appui opérationnel de longue durée.

- Les ressources prélevées sur le budget de la Banque et les fonds fiduciaires pour les projets visant à accroître le rôle des femmes ont fortement augmenté.
- Un noyau de spécialistes a été établi tout d'abord dans un bureau central puis au niveau des régions.
- Un programme d'analyses de la problématique hommes/femmes au niveau national a été entrepris avec les pays membres pour servir de base aux discussions de politique générale concernant les futurs projets.
- La réalisation de suivis et des rapports périodiques sur des progrès réalisés ont permis à la Banque et au Conseil de circonscrire la portée de leurs discussions.

Evolution du portefeuille des projets. Sur les 4.955 projets d'investissements approuvés au cours des exercices 1967-93, 615 au moins comprenaient des activités liées au rôle de la femme dans le développement, plus de la moitié étant approuvés au cours des exercices 1989-93. La problématique hommes/femmes a été nettement associée aux projets concernant la lutte contre la pauvreté et la valorisation des ressources humaines, 93 pour cent des 615 projets étant implantés dans des pays à faible revenu et à revenu intermédiaire. Plus des deux tiers (410 projets) ont été financés par l'Association internationale de développement. Le plus grand nombre de projets ayant des composantes liées au rôle de la femme dans le développement ont été mis en oeuvre en Afrique (41 pour cent), en Asie du sud, et en Amérique latine et Caraïbes (15 pour cent dans chaque cas). Parmi ces projets, ceux ayant trait à la valorisation des ressources

humaines étaient les plus nombreux (46 pour cent), suivis des projets agricoles (39 pour cent). Les sources de financement et la distribution du portefeuille selon les régions et les secteurs n'ont guère évolué au fil des ans, bien que la distribution sectorielle ait été plus diversifiée dans les projets les plus récents.

Résultats du portefeuille. Dans la plupart des cas, les activités liées à la problématique hommes/femmes n'ont représenté qu'un élément relativement peu important des projets, élément qui a toutefois connu les mêmes difficultés d'exécution que n'importe lequel des autres éléments des projets concernés. Par ailleurs, parmi les projets mis en oeuvre entre 1967 et 1984, le grand nombre de projets de développement rural intégré a fait baisser les résultats globaux de tous les projets ayant une activité liée à la problématique hommes/femmes. Il n'est donc pas surprenant que les résultats globaux des 196 projets menés à bonne fin n'aient pas enregistré de différences marquées dans leurs résultats selon qu'ils comportaient ou non de telles activités.

Lorsque les actions liées à la problématique hommes/femmes ont donné de bons résultats, les éléments suivants étaient présents :

- Engagement et participation des autorités aux actions liées à la problématique hommes/femmes et à l'ensemble du projet.
- Intégration très claire des objectifs liés au rôle de la femme aux objectifs d'ensemble du projet.
- Présence d'agents ayant l'expérience de cette question.
- Attention aux des actions concernant le rôle de la femme lors des supervisions du projet.
- Les recherches ont montré les avantages pouvant être retirés d'une telle prise en compte, et dans certains cas, elles ont permis de les quantifier.
- Des spécialistes intervenant dans les départements techniques, dans certains départements géographiques ainsi que dans les Vice-présidences centrales apportent un soutien opérationnel modulé en fonction des priorités régionales.
- Les actions visant à promouvoir les méthodes participatives et à accorder une plus grande place aux évaluations

Analyses des questions liées à la problématique hommes/femmes au niveau national. Ces analyses ont été menées dans 72 pays. Dans certains cas, elles ont encouragé un dialogue constructif avec les emprunteurs et renforcé leur volonté de tenir compte des questions liées au rôle de la femme dans le développement. Elles ont également intensifié les contacts entre les services spécialistes de ces questions et les chefs de projet, et favorisé les contacts entre les divisions intersectorielles.

Développements récents. Certains progrès récents sont encourageants :

- L'approbation en avril 1994 d'un document de politique générale et de politique opérationnelle a donné leur pleine légitimité aux stratégies axées sur la problématique hommes/femmes.
- Il semble que pour certains pays, l'analyse des questions liées à la problématique hommes/femmes ait renforcé la volonté des emprunteurs de s'attaquer à ces questions et ait conduit à en tenir compte plus systématiquement lors de l'identification et de la conception des projets.
- Les recherches ont montré les avantages pouvant être retirés d'une telle prise en compte, et dans certains cas, elles ont permis de les quantifier.
- Des spécialistes intervenant dans les départements techniques, dans certains départements géographiques ainsi que dans les Vice-présidences centrales apportent un soutien opérationnel modulé en fonction des priorités régionales.
- Les actions visant à promouvoir les méthodes participatives et à accorder une plus grande place aux évaluations

sociales dans le cadre des études sectorielles et des projets de la Banque devraient permettre d'apporter une attention accrue à la problématique hommes/femmes.

Tout au long des années 70 et 80, la Banque est restée réservée à l'égard d'un sujet que l'on continuait de considérer comme nouveau, difficile et délicat. La complémentarité des rôles soulève des questions complexes et dépend du contexte culturel. Toute initiative susceptible de changer ces rôles est délicate. Souvent toutefois, les changements de ce type se produisent d'eux-mêmes, rapidement, en réponse à des changements économiques et technologiques. Bon nombre des conditions nécessaires pour que la problématique hommes/femmes soit prise en compte systématiquement dans les opérations de prêt de la Banque sont maintenant remplies : une politique clairement définie sur la question, un bon soutien de la part du Conseil et de nombreux membres de la direction, les conclusions de recherches bien documentées, un personnel compétent tant au niveau central que régional, et une augmentation très nette des informations disponibles sur la situation de la femme dans les différents pays, y compris dans les économies en transition. On peut désormais mettre l'accent sur l'intensification du processus dans le cadre du dialogue entre la Banque et ses pays membres, et sur la mise en oeuvre de la stratégie opérationnelle définie dans le document de politique générale de la Banque. Mais pour cela, il faut un engagement soutenu, des ressources suffisantes et des éléments d'incitation appropriés.

Suggestions et recommandations

Pour que la dynamique actuelle se maintienne, il est essentiel qu'elle bénéficie d'un

puissant soutien évident à tous les niveaux de la direction et au sein du Conseil. Un apport de ressources suffisantes, et un suivi régulier des progrès accomplis, seront également nécessaires. Le fait que la direction ait récemment apporté son appui à la promotion des méthodes participatives et à la conduite d'évaluations sociales devrait aider à cerner plus facilement les problèmes relatifs au rôle de la femme. Pendant l'exercice 95, un Fonds de 2 millions de dollars pour la promotion d'approches novatrices du développement humain et social sera géré par le Département des Politiques opérationnelles en consultation avec le Département de l'Environnement¹. Dans la mesure où la problématique hommes/femmes est au coeur du développement social et humain, les actions entreprises dans ce domaine doivent pouvoir être financées à l'aide de ce Fonds.

Stratégie à l'égard des pays. Dans les documents sur la stratégie d'aide de la Banque à l'égard des différents pays, les déclarations concernant la problématique hommes/femmes sont forcément brèves. Ces déclarations ne peuvent aider l'emprunteur et le personnel spécialiste du secteur considéré à se mettre d'accord sur les problèmes à traiter en priorité que si elles sont le fruit d'un dialogue permanent entre l'emprunteur, l'équipe chargée du pays et les responsables du département concerné. Vu la diversité des pays membres, et l'approche différente de chaque département vis à vis de la problématique hommes/femmes, les étapes menant à l'élaboration du document énonçant la stratégie d'aide à l'égard des pays sont forcément très différentes suivant les cas. Lorsque, dans un pays donné, les études n'ont pas été suffisamment poussées pour servir de base à la formulation d'une stratégie d'aide valable à l'égard de ce pays, la participation de spécialistes de la problématique hommes/femmes à la préparation

de ce document ou à l'examen du portefeuille, et aux discussions avec l'emprunteur, peut être utile pour mieux comprendre les questions se rapportant au rôle de la femme dans le pays en question et à améliorer le dialogue avec l'emprunteur. Une telle participation pourrait avoir lieu à l'occasion d'un bilan d'exécution, d'un séminaire spécialisé (ou d'une réunion du consortium des organismes de développement), ou bien encore lors d'une analyse des questions relatives à la problématique hommes/femmes au niveau du pays. Il appartient à chaque département géographique de déterminer laquelle de ces démarches peut lui être utile. Dans la directive opérationnelle, il est d'ores et déjà stipulé que pour un pays donné, le bilan d'exécution doit vérifier l'application de la stratégie concernant la problématique hommes/femmes.

Les actions visant à renforcer le rôle des femmes ont plus de chances d'être mises à exécution si les services de l'emprunteur les soutiennent pleinement et sont résolus à tout mettre en oeuvre pour leur réussite. L'examen des questions relatives à la problématique hommes/femmes au niveau des pays et des différents secteurs peut aider à informer le personnel chargé des projets et à le convaincre que les mesures concernant les femmes peuvent être un facteur de réussite. On pourrait également envisager la participation de spécialistes de la problématique hommes/femmes à l'exécution des projets, ainsi que la tenue, à l'initiative de l'Institut de Développement économique, de séminaires à l'intention du personnel de la Banque et de l'emprunteur.

Conception et exécution des projets. Les mesures visant au renforcement du rôle de la femme ont davantage de chances d'être mises à exécution si elles font partie d'une analyse socio-économique plus complète et si elles sont bien intégrées aux objectifs des

projets. Les Directives relatives aux évaluations sociales précisent la marche à suivre pour intégrer très tôt les dimensions sociales lors de la conception des projets. Les responsables devraient veiller à l'application de ces directives par le personnel travaillant sur les projets, et à la prise en compte de la problématique hommes/femmes dans les termes de référence des travaux sectoriels et opérationnels dès lors qu'elle semble devoir jouer un rôle.

Les actions visant à renforcer le rôle de la femme ont été très peu suivies lors des premiers projets, et leur supervision a été très inégale pour ce qui est des projets qui seront bientôt terminés. Pourtant, une telle supervision contribue à la réussite des actions liées à la problématique hommes/femmes. Les initiatives jugées utiles pour améliorer la supervision consistent à faire participer des agents ayant déjà travaillé sur la problématique hommes/femmes lors de l'évaluation ou dès le début de la supervision des projets, et à effectuer un suivi thématique des projets choisis dans un secteur ou un domaine précis.

Pour que les chefs de projets, les spécialistes des pays et les services de la Banque disposent de toutes les informations nécessaires à la réussite des projets, il faudrait que des indicateurs mesurent les progrès accomplis et fassent, le cas échéant, la distinction entre les résultats obtenus du côté des hommes et ceux obtenus du côté des femmes; que les progrès accomplis au niveau des actions visant à renforcer le rôle de la femme soient évalués lors des examens à mi-parcours; et que les résultats obtenus respectivement par les hommes et par les femmes soient indiqués dans la rubrique « Enseignements » des rapports d'achèvement.

Soutien technique. Pour permettre aux responsables de projets de bénéficier de tout

le soutien nécessaire et faire en sorte que les projets comportant des éléments relatifs au rôle de la femme soient correctement préparés, des équipes de spécialistes de la problématique hommes/femmes ont mis au point, dans plusieurs régions, une procédure d'examen systématique du résumé analytique initial. L'expérience a été concluante jusqu'à présent, et elle doit être poursuivie. Selon les termes mêmes d'un chef de projet, «la problématique hommes-femmes doit faire partie des sujets à couvrir [par des chefs de projet]». L'étude a révélé plusieurs cas dans lesquels des responsables de projets avaient révisé leur point de vue après avoir travaillé sur le terrain avec des collègues ayant déjà l'expérience de la problématique hommes/femmes. Ce type de formation sur le tas doit être encouragé. Le programme actuellement lancé par l'équipe analyses et politiques concernant la problématique hommes/femmes devrait fournir des orientations pratiques aux responsables de projets dans le cadre de sessions de formation organisées en collaboration avec les différentes Divisions géographiques, et grâce à la préparation de notes didactiques présentant brièvement des problèmes et des exemples concrets. Les questions liées à la problématique hommes/femmes devraient également continuer à être abordées dans le cadre de la formation sectorielle toutes les fois que cela est souhaitable.

Evaluations a posteriori. Le Département de l'évaluation rétrospective des opérations devrait donner priorité aux projets susceptibles de fournir des enseignements sur la problématique hommes/femmes lors de la sélection des projets soumis à une évaluation. Les termes de référence des responsables de l'évaluation rétrospective devraient préciser qu'ils doivent analyser séparément les résultats obtenus par les hommes et par les femmes. L'expérience de la Banque avec les projets axés exclusive-

ment sur les femmes devrait être évaluée une fois que les projets en cours seront terminés.

Recherche. Lorsque la Division du Département population et ressources humaines chargée d'examiner le rôle de la femme dans le développement avait lancé un programme de recherche sur la problématique hommes/femmes, son but avoué était de démontrer aux services de la Banque qu'il était justifié de prendre en compte ces questions dans le cadre de leurs travaux. Ces recherches ont pris plus de temps que prévu, mais elles ont donné certains résultats extrêmement valables, qui ont attiré l'attention des services et de la direction de la Banque. Les sujets de recherche à prévoir varieront vraisemblablement d'une région à l'autre.

L'évolution de l'intégration de la problématique hommes/femmes dans les opérations de prêt de la Banque montre comment une institution organisée par secteurs et zones géographiques a pris en compte une question ayant une incidence sur beaucoup de secteurs. La formation de groupes de travail et les initiatives émanant des agents même de la Banque n'ont pas suffi à elles seules à induire les changements politiques et structurels nécessaires. Les pressions extérieures ont elles aussi joué un rôle, mais elles n'ont pas été déterminantes. Pour qu'un nouveau programme soit mis en place, il a fallu un puissant soutien de la part de la direction, réitéré à maintes reprises, et allant de pair avec un effort financier. Les fonds de la Banque ont dû être complétés par des apports extérieurs. Pour que les questions intersectorielles recueillent toute l'attention nécessaire dans le cadre des études économiques et sectorielles et lors de l'exécution du portefeuille de projets, il fallait qu'il y ait suffisamment de spécialistes de ces questions aussi bien au niveau des Vice-présidences centrales que régionales.

L'analyse va devoir être poussée plus loin pour aider à mieux comprendre ce qui amène les emprunteurs à aborder les questions touchant à la problématique hommes/femmes lors de la planification du développement. Il faudrait également examiner pourquoi il semble que la problématique hommes/femmes soit davantage prise en compte dans les projets préparés selon des méthodes participatives.

Note

1. Mémoire du 1er juin 1994 établi pour le compte du Directeur du Département des politiques opérationnelles à l'intention des responsables des services centraux et opérationnels. Les fonds sont mis à la disposition des Vice-présidences Centrales et Régionales pour les aider à promouvoir «des approches novatrices du développement humain et social» susceptibles d'améliorer la qualité des opérations de la Banque, et notamment les approches novatrices consistant à encourager les parties prenantes à participer à la conception et à l'exécution des projets de développement, ainsi qu'à effectuer des évaluations sociales.

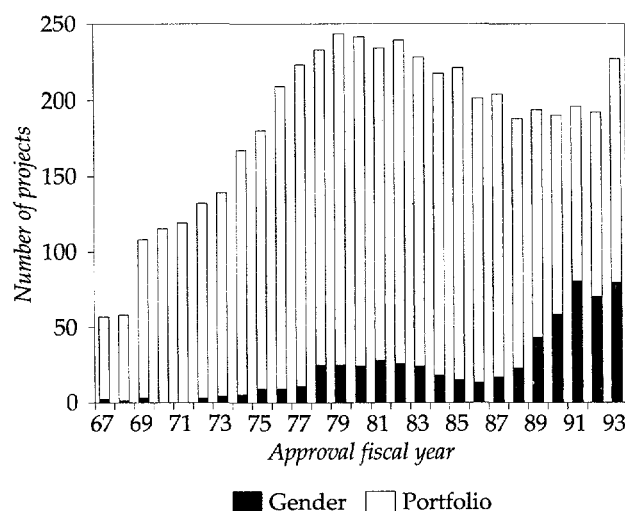
1. Gender roles and development

Operations Evaluation Department (OED) reports have noted repeatedly that insufficient attention to the roles of women was detrimental to project efficiency and sustainability.¹ A working paper of the Portfolio Management Task Force Report found that “gender issues [were] thoroughly addressed only in a very limited number of country strategies. . .” and that the “substantive link between economic and sector work and lending operations [was] still weak.”²

The visibility of gender issues in World Bank activities has increased over time, especially in recent years. Since FY91, more than a third of all investment projects have included measures dealing with gender-related issues (see Figure 1.1). Countrywide assessments of the situation of women have been completed in some 72 countries. In April 1994, the Board approved the Bank’s first policy paper (*Enhancing Women’s Participation in Economic Development*) and operational policy statement (*The Gender Dimension of Development*) on the subject, thus setting forth clear objectives for Bank staff.

The policy documents provide a solid basis for discussion of gender issues with borrowers, and they give staff clear objectives. The focus is now on implementation. Interviews with Bank staff showed that initiatives to bring out the ‘invisible’ women³ in Bank-

FIGURE 1.1: PROJECTS WITH GENDER-RELATED ACTION IN TOTAL INVESTMENT PORTFOLIO BY APPROVAL FISCAL YEAR^a



a. Does not include SAL, SECAL, and debt reduction lending as characterized in the Bank Management Information System. Source: Management Information System (MIS).

funded projects during the 1970s and early 1980s have been largely forgotten. These early efforts, which established basic principles still found in the current policy, encountered much difficulty in moving from rhetoric to implementation. They provide lessons relevant for implementation of the current policy.

This first OED review of gender issues in Bank lending examines the evolution of

Bank strategy across sectors and assesses results achieved so far. With two-thirds of projects containing gender-related action still in progress, this assessment is, of necessity, provisional. The report examines Bank strategy and operational achievements from 1967 to 1985, a period of reaction to inside and outside events (see Chapter 2), and during the proactive years since then (see Chapter 3). The overall performance of projects over the study period is discussed in Chapter 4. The findings are summarized in Chapter 5, together with suggestions and recommendations.

Relevance to poverty alleviation and economic development

The time frame of the study coincides with a period of great increase in knowledge and experience among borrower and development agencies. Numerous case-studies, social and economic research, and evaluation reports have documented how women as well as men contribute to the development of their country, and have measured the deleterious effects of projects that ignored differences in gender roles in a given setting. These issues were given visibility through a series of international conferences, sponsored by the United Nations, in Mexico City (1975), Copenhagen (1980), and Nairobi (1985). A fourth World Conference on Women—Action for Equality, Development and Peace—is scheduled for September 1995 in Beijing.

Disaggregation of national statistics between men and women shows that women in many countries are responsible for 50 to 80 percent of food production. Worldwide, women represent well over one-third of the labor force, and in Africa and Latin America, they account for more than half of the informal sector. During the 1980s, the formal employ-

ment of women increased everywhere, yet women continue to have less access to education, resources, and services than men. They are paid less, and remain more likely to have incomes below poverty level.⁴

Research has shown that:

- Although women's potential productivity—particularly in food production and trade—is high, lack of essential services and heavy burdens on their time by non-productive tasks are keeping their actual productivity abnormally low.⁵
- In part because women with some education have been found to have fewer children (who in turn are healthier and better educated), the education of girls “yield[s] a higher rate of return than any other investment available in the developing world.”⁶
- Women's involvement in community affairs is central to a participatory approach to development, and can play a major role in environmental conservation.⁷

Gender differences are at the core of human resource development. They are relevant for alleviating poverty, increasing agricultural productivity, changing trade patterns, decreasing demographic growth, and preserving the environment. Understanding the responsibilities and roles of women and men among various income and ethnic groups will help borrowers plan and implement effective development strategies.

For the same reasons, attention to gender issues is essential to achieve the Bank's mandate of poverty alleviation and economic growth. The policy paper reviews how investing in women promotes growth and efficiency, reduces poverty, helps future gen-

erations, and promotes sustainable development (see Chapter 2). Most development agencies recognize the economic efficiency and equity justification of addressing gender issues in development programs.

Social and cultural foundation of gender roles

In all countries, men and women function differently in their household, their community, and in society at large. The behavior expected of women in a given cultural group is organized around their three roles:⁸

- *Reproductive role within the household.* In addition to child-bearing, women are usually held responsible for the daily tasks (such as cooking, cleaning, fetching water) that ensure the survival and well-being of their children and other household members.
- *Productive role within society.* Both men and women produce income, whether as wage earners or farm laborers, or through food processing and other informal activities. Women's involvement in the formal labor market varies greatly from country to country and with the social and economic status of their household. However, the productive role of women is invariably greater than is reported in formal labor statistics.
- *Role within the community.* While men are more likely to be actively involved in their community's political interaction with the greater society, there is increasing evidence that women often play a leading role in internal community affairs.

An understanding of basic concepts on women in development (WID) and gender issues helps place the evolution of thoughts

and actions within the Bank in the broader context of development theory. "Women in development" and "gender" are not interchangeable. The first, and earlier, term was applied to actions designed to ensure that women benefited, or at least did not suffer, from development efforts. Gender-related development activities, on the other hand, take a broader view of the differences in behavior expected of women and of men, seeking their causes and their consequences for economic and human resources development. Gender-related actions can prevent deleterious consequences and maximize the potential contributions specific to women or men through direct intervention on immediate constraints, or through strategic changes in the legal and regulatory framework of the country.⁹

A shift from a WID to a gender approach has profound implications for the Bank. A WID focus does not analyze the reasons behind differences in access to resources, services, and opportunities between men and women in a given society or group. It simply designs projects so that these differences are compensated for when necessary. A gender focus identifies the reasons for these differences and their consequences on individuals (men and women), households, communities, and economic development in general, and attempts to modify their negative impact.

Gender roles are determined by cultural and religious beliefs, so they vary across ethnic, income, or class groups, even within a country. Interventions that could entail a change in these roles are, by definition, sensitive. Yet such changes often occur spontaneously and quickly, as economic and technological conditions evolve. When purposefully induced by a borrower, changes in gender roles can be promoted by regulatory measures and incentives, provided that these are tailored to the country's cultural and religious foundation.

BOX 1.1: METHODOLOGICAL ISSUES FOR EVALUATING CROSS-SECTORAL ACTIVITIES

Methodologically, this study faced two major issues: there is no standard definition of the unit of observation, and there is no complete listing. What is considered 'proactive' with regard to reaching women as well as men is difficult to define. The Bank's management information system includes project objectives codes, with a WID subcategory to the human resources code. But these codes are not used systematically, and coverage has been complete only since FY87. Bank portfolio databases are organized around sectoral and sub-sectoral categories. A database maintained in the central WID unit for FY88-93 rated projects that were submitted to the Board for gender-related actions. But spot checks showed that the rating system was lenient, so that projects with very limited action were included.

A listing of some projects with gender-related action approved before FY88 was incomplete and sectoral coverage was uneven.

The study compiled a list of projects with gender-related action approved from FY67 to FY93. This was done by reviewing projects identified from central and OED databases, Bank Annual Reports and World Development Reports, and central and regional portfolio reviews (see Annexes 1 and 2). One objective of this study was to identify trends, so the rating system in use during FY88-93 was used here for consistency. The 615 projects thus identified include some with minimal action, and so provide an optimistic view of gender-related planning in Bank lending.

Study design

The study covers Bank activities since 1967. It is organized around three questions: What did the Bank say it should do? How did it organize itself to do it? What was actually done in economic and sector work (ESW) and operations? The institutional files were reviewed and Bank staff and retirees interviewed to trace the chain of events leading to key institutional decisions, and to follow Bank strategy over time. Discussions with central and operations staff currently promoting Bank efforts indicate that much of this early history had been forgotten, so its inclusion in the study report was considered important.

Identifying the relevant portfolio for this study has been difficult, because no existing database lists projects with gender-related action for the entire period (see Box 1.1). Some 615 projects with gender-related actions were identified. Their performance ratings and distribution over time, region, sector, and country income level were compared to those of the investment portfolio for the same period. An analysis of implementation experience and results was also conducted for two clusters of projects: 36 projects cited in a 1979 publication as examples of best practices (old cluster), and the 24 projects with gender-related action approved during FY86-87 and to be com-

pleted by June 1994 (new cluster). A detailed review of project documents, files, project completion report, and audits was conducted, and staff were interviewed. The same approach of reviews and interviews was used to evaluate selected country studies and assessments.

Notes

1. See, for example: Operations Evaluation Department (OED), "Rural Development Projects—Retrospective View of Bank Experience: Sub-Saharan Africa," World Bank, Washington, D.C., 1978; OED, "Review of Training in Bank-Financed Projects," 1982; OED, *Strengthening Agricultural Research and Extension: the World Bank Experience*, 1983; OED, "World Bank Agricultural Sector Operations Review—Malawi and Burkina Faso," 1984; OED, "Sustainability of Projects: First Review of

Experience," 1985; OED, *Aga Khan Rural Support Program in Pakistan: An Interim Evaluation*, 1986; OED, *Rural Development: World Bank Experience, 1965–86*, 1988.

2. "Effective Implementation: Key to Development Impact." Working Paper on Programs of Special Emphasis: Implementation of Women in Development. September 1992, paras. 47–48.

3. The expression, the title of a 1979 Bank publication, is frequently used to this day in development literature.

4. International Labour Organization, *Yearbook of Statistics*, United Nations, 1991.

5. Saito, et al., 1994.

6. Summers, 1992.

7. United Nations Environment Programme and Worldwide Network, 1992; Narayan, 1993.

8. Moser, 1993.

9. There is extensive literature on the subject. See for example Moser, 1993; Beneria and Feldman, eds. 1992; Wallace and March, eds., 1991.

2. The reactive years, 1967–85

Conceptual and institutional evolution: recognizing the ‘invisible’ women

Starting in the early 1970s, pressure from some staff and managers and events outside the Bank would place what became known as ‘women in development’ on the Bank’s agenda (see Box 2.1). In line with early sector papers on education and on population, a few projects incorporated activities targeted for girls or women, but these did not represent more than 5 percent of investment lending until FY78.

For example, the Zambia Education III Project (L0900, approved FY73) included targets for training women farmers. The loan officer insisted that, since women did most of the farming, they (rather than male heads of household) should be trained. She recalls that staff in the projects department argued against the inclusion of women trainees, and that she “guarded [this target] like a hawk.” The discussion of WID issues during the Board presentation was the first recorded in Board minutes. The next year, a review of rural training programs for women was conducted in Niger, and later used by Bank staff for other projects in the Africa region. The terms of reference for a 1975 economic mission to Togo included a study of women’s roles and status, the first recorded Bank study of women in country work.

A small number of staff and managers were beginning to discuss informally the new topic of women in development. The first working group of the Bank’s Staff Association, created in 1972, focused on the status of women in the Bank. The group met periodically to discuss the concerns of female staff. About 1973, some members of the working group started a separate informal group to discuss emerging WID issues. Members of this informal WID lunch group were trying to include some attention to gender issues in their own work, and to promote the topic with management. Their efforts would soon be reinforced by events outside the Bank.

When the UN General Assembly designated 1975 International Women’s Year and planned an international conference in Mexico City for July, the Bank’s president—who had not mentioned women in his 1973 Nairobi speech introducing the Bank’s new approach to rural development and poverty alleviation—was prompted to note that “in connection with the International Women’s Year designation . . . the Bank is reviewing its activities, particularly in the field of education, to make a more direct and effective contribution toward improving the situation of women in the developing countries.”¹

Few development agencies at the time had formally recognized the relevance of gender

issues for development. The use of aid funds to improve women's access to training and education was first proposed by the Swedish Parliament in 1963, and the Swedish International Development Agency joined the UN International Labor Organization, Food and Agriculture Organization, and Educational, Scientific and Cultural Organization (UNESCO) to fund a women's educational program in Africa. By 1968, Sweden had proposed to the UN a long-range program for the advancement of women, moving away from separate projects to a better integration of women into development programs. The Swedish bilateral agency's 1972 program called for studies and projects adapted to local conditions in the area of employment, education, and health.

The United States Congress mandated its bilateral aid agency to support the integration of women into economic development in 1973. The Percy Amendment recognized that such integration would improve the effectiveness of development efforts, as well as the status of women. The U.S. alternate executive director to the Bank described the Percy Amendment at a Board meeting in April 1975. While noting that the role of women was an internal concern of member nations, he encouraged the Bank to promote the collection of gender-specific data and the integration of women into its projects. He also requested periodic progress reports, but the first such report would not be presented to the Board until 1990.

A formal request by the UN for contributions to the Mexico City conference forced the Bank to act, albeit minimally.² Since the Bank had no staff working on WID, senior advisors on policy planning in the International Relations Department were charged with preparing a paper and leading the Bank's delegation. They created an informal

working group, which included the members of the informal WID lunch group, thus giving these individuals an opportunity to shape the Bank's conference publication. But the International Relations Department was looking for a public relations document describing how the Bank's "new-style" projects had benefited women, while the informal group wanted to prepare staff guidelines to ensure that future Bank projects would improve women's well-being and increase their participation in development. When solid guidelines could not be completed in time for the conference, the plan for staff guidelines was dropped, although questions developed for the exercise were appended to the paper and published in 1975 as a public relations booklet. The document *Integrating Women into Development* described a few measures to reach women through projects, mostly by reinforcing traditional domestic roles, and summarized basic principles still retained today.

- *Poverty alleviation*, to address women's roles specifically within the larger policy framework of poverty alleviation.
- *Mainstreaming*, to deal with women within the context of regular projects instead of special WID projects.
- *Focusing on selected sectors*, in particular, in rural and urban development, education, and population, health, and nutrition (PHN).
- *Improving women's status as one factor in lowering fertility*.

Taking the arguments presented by the informal working group to heart, an International Relations Department advisor warned that "... the time has come for the Bank to deal with the role of women in development in a wider or more systematic manner..."³

BOX 2.1: CHRONOLOGY OF THE REACTIVE YEARS, 1967-85

Year	Major speeches/publications/ policies/OMSs/PNs/ODs ^a	Institutional changes and events	Outside events
before 1970 1970			Sweden WID mandate (1963), then mainstream (1968). UN General Assembly adopts the "Programme of Concerted International Action for the Advancement of Women."
1972		Creation of the Staff Associa- tion's Status of Women Working Group.	UN General Assembly passes resolution declaring 1975 Inter- national Women's Year (IWIY).
1973	President defines the World Bank's new poverty-alleviation emphasis in his annual meeting speech in Nairobi (September).		U.S. Congress passes the Percy Amendment to the Foreign Assistance Act, on "Integrating Women into National Economies" (December).
1974	International Relations Depart- ment prepares "The Integration of Women into the Develop- ment Process" for the 1975 Mex- ico Conference.	World Bank International Rela- tions Department sets up inter- departmental working group to plan Bank's contribution to International Women's Year.	UN General Assembly passes resolutions calling for a New International Economic Order to enable Third World countries to overcome mass poverty and unemployment (April, May, December). UN Voluntary Fund for the International Women's Year established (May). United States Agency for Interna- tional Development (USAID) issues first policy directive to incorporate a "conscious con- cern" for women into all pro- gramming processes (September). USAID creates post of WID coordinator (October).
1975	World Bank publishes "Inte- grating Women into Develop- ment," based on an International Relations Depart- ment paper (August).	World Bank endorses Percy Amendment (April).	World Conference of the Inter- national Women's Year held in Mexico City; World Bank sends low key two-person delegation and representative to the non- governmental organizations forum (June 19-July 12). UN General Assembly passes resolution proclaiming 1976-85 the UN Decade for Women: Equality, Development and Peace; the UN Voluntary Fund is established. Norway issues WID mandate. Development Assistance Com- mittee (DAC) holds first meet- ing on "Integrating Women into Development" (October).
1977	President highlights the impor- tance of raising women's socio- economic and political status, MIT speech (April). Operational manual statement (OMS) 3.74 on population links women's education and em- ployment with lower birth rate.	World Bank appoints its first WID Advisor in the project advisory staff of the central pro- jects staff (January).	

(Box 2.1 continued)

Year	Major speeches/publications/ policies/OMIS/PNs/ODs ^a	Institutional changes and events	Outside events
1978	WID advisor begins producing a series of papers, "Notes on Women in Development." OMS 2.12 on project generation and design includes discussion of intra-household labor, and community roles of men and women among necessary information.		Germany and United Kingdom issue WID mandate.
1979	World Bank publishes Recognizing the 'Invisible' Woman in Development: The World Bank's Experience (October).		
1980	UN World Conference chair speaks at the Bank on "Women in Development and International Institutions—Prospects for the 1980s" (January).		World Conference of the UN Decade for Women (mid-decade conference) held in Copenhagen; Bank sends four-person delegation (July 14-30). Netherlands issues WID mandate.
1981		Bank reorganization: Projects advisory staff becomes Policy Projects Department, Policy & Review Unit. World Bank begins WID seminars for its staff (December).	DAC establishes Correspondent's Group for women in development (January).
1982			USAID issues WID policy paper (October). European Economic Community issues WID mandate. DAC adopts "Guiding Principles" for addressing women.
1983			Creation of DAC expert group on WID. Canada issues policy guidance.
1984	OMS 2.20 project appraisal requires sociological analysis and attention to women's needs during project design.	Economic Development Institute's Task Force on Women and Development started (October). A new "more operational approach" is proposed for the Bank's WID Program (November).	UN Voluntary Fund for the Decade for Women (\$12 million annual budget) is transferred to an autonomous association, becoming the United Nations Development Fund for Women, UNIFEM (July). World Conference to review and appraise the achievements of the UN Decade for Women held in Nairobi; World Bank sends a six-person delegation including the vice president for the East Asia and Pacific Regional Office, the first senior Bank official to address a UN women's conference (July 15-26).
1985			

a. OMS = operational manual statement; PN = policy note; OD = operational directive.

In Mexico City, furthermore, conference participants criticized the Bank and other development agencies for claiming to address women's roles in development through actions to control their reproductive role. The warnings of the Bank's own International Relations Department delegate to Mexico City was more forceful: "We can expect—not tomorrow, but soon—that we will be called on to refocus our projects, even those we call 'new-style': teaching handicrafts and gardening to rural women will not suffice. Neither will 'agricultural credit,' unless there is assurance that the facilities are available to women, not just to the male tenant or landowner."⁴

In response, the Bank's president requested that senior managers consider actions to comply with the Mexico conference's resolutions (see Box 2.2). The informal working group, believing that "the role of women in development was only one aspect of a broader question to which the Bank had given little attention, namely the impact of its projects upon the society . . .,"⁵ once again proposed the development of in-depth Bank guidelines. Coincidentally, in July 1975, an anthropological consultant at the Office of Environmental and Health Affairs began examining the sociocultural and ecological implications of development projects and focused increasingly on the differential impacts of projects on women. In the absence of a WID advisor, she identified relevant projects and provided technical support. Although WID was not mentioned in her terms of reference, she considered it a natural outgrowth of her approach to social analysis.

An institutional first: a WID advisor post

In preparing for the 1975 Mexico conference, the informal working group had suggested that the Bank establish a focal point for

WID, as had other international agencies. A WID position would show the Bank's willingness to address women's issues, and the WID advisor could handle the growing operational and external relations workload. After considering placing the post in the International Relations Department, management decided to locate it in the projects advisory staff of central projects, together with other advisors on cross-sectoral issues.⁶ Although the informal working group had recommended the post be assigned to a Bank staff-member, management appointed an outsider with internationally recognized credentials. In January 1977, a senior UN official already involved in women's issues became the first World Bank advisor on WID.

The WID advisor had a broad mandate to make Bank staff more aware of the costs and benefits of taking women into consideration, to provide operational support, and to respond to outside requests for information. Like other projects advisory staff, she first concentrated on giving technical support in the early phases of project design. By the 1980s, she was able to focus more on supervision and evaluation, and—with consultants' assistance—to train staff and provide relevant written materials.

A review of Bank experience, *Recognizing the 'Invisible' Woman in Development: The World Bank's Experience*, was published in August 1979.⁷ The Bank's president signed the preface—the highest mark of management support yet given to a WID document. Each section included an analytical overview of economic and social barriers to women's participation in development, examples of Bank projects trying to overcome these barriers, and a summary of gender-related factors to be taken into account in project preparation (similar to the questions in *Integrating Women into Development*).

As a summary of concepts and general principles, the document still stands. It confirmed the link between poverty alleviation and increased awareness of women's roles. It emphasized attention to local factors early in the project cycle. Perhaps most importantly, it aimed "to see that women are treated as an integral part of a project's design, and to assess [a project's] impact on women as part of its costs and benefits." While acknowledging that "legislative, policy, and program decisions rest with governments," it noted that Bank actions could make the climate for addressing women's issues more favorable. Sectoral priorities—expanded since 1975 to emphasize women's productive roles—included education and training, agriculture and rural development, urban development, employment and income-generating activities, PHN, and intersectoral concerns. Despite its importance, the report was poorly organized and provided little specific operational guidance. Yet as the only statement on the Bank's position for many years, it was broadly disseminated.⁸

To document outside and inside experience:

Documents from other agencies were collated—a collection that later formed the core of the Sectoral Library's WID reference collection. Thirty-five case-studies and evaluations of Bank experience were published between 1979 and 1985 in the series "Notes on Women in Development." The papers covered a broad range of topics (such as project analysis, cultural factors), sectors (such as, industry, small-scale enterprises, agriculture, education, forestry), and countries. While providing compelling evidence of the topic's relevance, however, they lack the analytical rigor and quality of more recent work. The advisor was unsuccessful in her repeated attempts to get some of these "Notes" formally published by the Bank.

Between 1981 and 1984, the "Notes" provided basic documentation for a series of five training workshops attended by about 120 Bank staff. The workshops were the first (and until 1988 the only) gender-related training in the World Bank. Their impact on the Bank was limited; some participants interviewed did not remember attending, while others continue to use the training binders from those sessions when working on current projects with an innovative gender component.

The workshops played a key role in establishing the principles of gender analysis training used throughout the development community during the 1980s. They were run by a team of four consultants: a trainer experienced in the Harvard case-studies training method and three WID specialists. Using material written by the WID advisor and her consultants, this team developed training case studies and designed an interactive agenda.

This work became known outside the Bank and was soon adopted by other agencies. The Bank helped the United Nations Development Programme run a similar workshop. USAID then recruited the consultant team to develop cases based in their own projects, to organize a series of workshops, and to publish a manual and casebook which became a classic in the literature on gender analysis. Typical of the Bank's position during this period, an innovative idea was not sufficiently well-received to be carried to its fullest realization within the Bank, and other agencies picked it up (see Annex 3).

To monitor progress: A computerized database of relevant planned and on-going projects was created, covering mostly human resources and agriculture projects. While less systematic than the database created in FY88 by the Women in Development Division,

BOX 22: THE LEGACY OF THE UN DECADE FOR WOMEN

The catalytic effects of the UN International Women's Year (1975) and International Decade for Women: Equality, Development and Peace (1976-85) are undeniable. Three international conferences, and their preparatory and follow-up activities, resulted in a blueprint for action and milestones for measuring progress. Today, preparation is underway for a 1995 conference in Beijing. Yet the actual effects of these efforts are still being debated, and the decade's goals are now targeted for the year 2000.

Mexico City, 1975. Participants adopted a World Plan of Action to equalize legal and political rights, and give equal access to education, training, technology, and employment. International agencies were called upon to increase their attention to women in their programs, and to put more women in decision-making positions. The conference led the Bank to discuss WID for the first time at its 1975 annual meetings, with the chairman noting the "enormous potential of women" in his opening remarks. A program on WID was included for the first time, but on the spouses' program. The operational vice presidents' discussion of the action plan was their first discussion on WID. The informal staff group called for staff guidelines and kept up the pressure from within. Over the next years:

- In 1977, the Bank appointed its first advisor on women in development and initiated the systematic review of projects, a project monitoring system, and a series of monographs on projects and issues affecting women. While no staff guidelines were issued, selected operational manual statements (OMS) provided limited guidance.

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- In the international community, a number of bilateral and multilateral agencies established advisory posts or offices to coordinate women's issues and many funded WID components or projects. Following a UN recommendation, many governments created national women's bureaus. Several bilateral agencies already had a WID mandate: Sweden since the 1960s, the U.S. since 1973, and Norway since 1975. Germany and the United Kingdom did so in 1978, the Netherlands in 1980.

Copenhagen, 1980. The midterm review determined that expectations had been too high. More specific, practical measures for the second half of the decade focused on education, employment, and health. Although the Bank's WID advisor took an active part in UN preparations, the Bank's contribution was limited to a photographic exhibit and distribution of a pamphlet, *Recognizing the Invisible Woman in Development: The World Bank's Experience*. Pushed by the Status of Women Working Group, management also expanded the

(Box 2.2 continued)

delegation to include representatives of recruitment and the Status of Women Working Group as well as the WID advisor and the director of the International Relations Department. Some staff members also helped organize sessions in the nongovernmental organization forum. Again there was a burst of post-conference activity. The photographic exhibit was made into a pamphlet, "Women in Development," for the annual meeting. A WID session was held, again for spouses. In his final address to the governors, the president noted the "immensely beneficial impact from educating girls." In a later meeting with the president, the Status of Women Working Group presented a proposal for increasing Bank attention to WID issues. Over the next years:

- Training in gender-related issues was offered to Bank staff for the first time (1981-84). The WID advisor provided advice during project preparation and implementation. The first OMS with detailed guidance on dealing with gender differences was issued (January 1984) and WID was discussed in Bank Annual Reports and World Development Reports.
- In the international community, the European Economic Community issued a WID mandate for its assistance program, and the Development Assistance Committee's WID Correspondents' Group

agreed on "Guiding Principles" (1983). The United States Agency for International Development (USAID) and Canada issued policy guidance to their staff (1982 and 1984).

Nairobi, 1985. The last conference of the decade acknowledged that progress had been slow and limited. Longer-term strategies to advance the status of women by the year 2000 were proposed. They took account of men's and women's different societal roles, and continued to stress equality and education for women. The Bank contributed evaluations of five completed Bank projects to a United Nations Development Programme interagency program assessment. For the first time, a senior manager (vice president for EAP) represented the Bank. The outgoing WID advisor, her successor, a senior population advisor, and representatives from personnel and public affairs also participated. Following the conference, "The Bank's World" featured a special report on women in development. Over the next years:

- A systematic program of research and operational support was initiated.
- In the international community, most bilateral agencies and the Africa, Asia, and Inter-American Development Banks approved policy papers or statements in 1985-87, often with emphasis shifted from WID to gender.

Population and Human Resources Department, it provided the only institutional memory on WID through the mid-1980s.

Four factors constrained the visibility and impact of the WID advisor. First, her low-key approach, based on suggestion rather than directive, fitted her advisory role to technical, mostly male, professionals. Second, there was little cooperation with the informal working group (and later on with the WID sub-group of the Status of Women Working Group). Third, a great deal of time was spent on liaison work with outside agencies, defending the Bank's commitment to women and improving the Bank's relations with UN agencies, the Development Assistance Committee (DAC) agencies, and the public. (Because her schedule was heavy with outside meetings and speaking engagements, however, her image as a public relations position was reinforced.) Finally, support from management was uneven, and the WID budget never topped \$90,000 plus half of a researcher's position.

The advisor expressed her frustration in her 1985 exit report, bluntly stating that the paltry resources allocated to WID "bring into question the seriousness with which the Bank views its function."⁹ Introducing the report to the operational vice presidents in July 1985, she noted that "compared with many bilateral and multilateral agencies involved with considerably less financial transfer and working with narrower substantive and geographical scope, the Bank WID function is allotted peanuts."¹⁰ By this time, management did not disagree, and a significant increase in resources soon followed.

Evolution of management support

Although at first most senior managers addressed gender issues only in response to

outside pressure, a few were particularly sympathetic. Staff interviewed recall the important role played by managers' wives for whom seminars on WID issues were offered during annual meetings. As managers became increasingly aware, statements by Bank presidents shifted from cautious to supportive but stopped short of clear directives regarding gender-related issues to staff.

President McNamara was the first Bank senior manager to mention women in development in major speeches. His 1977 Population Address advocated educating girls and "rais(ing) the status of women socially, economically, and politically" as a means of lowering fertility.¹¹ In 1980, his final address to the Board of Governors emphasized "the immensely beneficial impact on reducing poverty that results from educating girls . . . Women represent a seriously undervalued potential in the development process. And to prolong inequitable practices that relegate them exclusively to narrow traditional roles not only denies both them and society the benefits of that potential, but very seriously compounds the problem of reducing poverty."

In a 1980 meeting with the Status of Women Working Group, the president acknowledged that the Bank had often discriminated against women in the development process, "not intentionally but by neglect and insensitivity to the issues."¹² But he did not authorize the Status of Women Working Group to write a sector paper on WID, saying that the topic had been covered in the 1980 World Development Report on poverty and human development. The Status of Women Working Group also lobbied for an international symposium on "Women, the Bank, and Development," which—despite support from the president—was never organized.

The Bank's shift toward macroeconomic policy during the early 1980s made such issues as poverty alleviation and gender less immediate Bank concerns. Staff active in WID activities remember Mr. Clausen, who took office as president in 1981, as less supportive. Yet he continued to mention WID issues. During the 1983 annual meeting, he noted, "In acknowledgement of the concerns expressed by a group of Governors—that, at the Bank, we see the enhancement of the status of women and their role in development as a most important contribution—if not the most important contribution, to the solution of many social development problems, including the population problem. Therefore we shall continue to devote our attention to the role that women play in the development process."¹³ Similar wording would reappear in the WID progress reports of 1990-93, and in the 1994 policy paper *Enhancing Women's Participation in Economic Development*.

Coverage of gender issues in major publications and guidelines

The 1983 president's address to the Board of Governors reported increased attention to women in development. The 1984 Annual Report, World Development Report, and OMS 2.20 spoke more explicitly about WID than had their predecessors. Indeed, these and the Bank's 1985 *Investing in Development: Lessons of World Bank Experience* summarized current understanding of the impact of women's status on development and restated the Bank's view of women's role in poverty alleviation. The 1984 Annual Report, with four pages on WID and a box on *Issues on Project Design* abstracted from the WID advisor training documents, claimed that the Bank "tries to ensure that staff are aware of the roles of women in the project area that are relevant to the objectives of the project" (see p. 68). Yet the sec-

tion contained no examples of how staff awareness had translated into project actions or other measures to ensure attention to women. It was used as the Bank contribution to the 1985 UN conference, however, and provided a model for regular reporting on WID throughout the early 1990s.

Several World Development Reports were more analytical. The 1980 report on poverty and human development made frequent references to women, almost always in the context of their reproductive roles. The 1984 report on population was the first to include a statistical table on women and a framework for discussion beyond education (although labor, like education, still was discussed in terms of fertility reduction). It is not until the 1990 report on poverty that women's productive roles were also discussed.

Throughout the early years, operational guidance to staff was limited and sporadic. The informal working group had tried (but failed) to develop Bank guidelines. A set of questions that education staff should raise in project discussions was provided in 1976, through a simple memorandum signed by the director of the Central Education Department. Seven years after a WID advisor was formally in place, the 1984 OMS 2.20, para. 62, on project appraisal would be the first formal, fairly explicit guidance to staff (see Box 2.3).

Just as early attention to WID in project design was the work of a few committed individuals, including several anthropologists and sociologists, OMS 2.20 addressed WID issues in the section on sociological aspects of projects. Drafted with the assistance of an informal Bank sociologists' group that included the WID advisor, the OMS placed attention to women in the

BOX 2.3: DISCUSSION OF GENDER ISSUES IN SECTOR PAPERS, OPERATIONAL MANUAL STATEMENTS, AND OPERATIONAL DIRECTIVES

The reactive years

A 1970 president's memorandum shifted emphasis from vocational and general secondary to primary education. The October 1974 Education Sector Policy Paper (Report No. 561) shifted the emphasis to basic education for *all members* of the population. It signaled the need to expand enrollment for girls and expansion of education to adults, and especially women. Although it discussed equity in terms of "addressing imbalances among geographic, ethnic, social, sex, income and age groups," efficiency was not discussed in terms of increasing girls' enrollment.

The 1972 Sector Program Paper stated that "the central purpose of economic development is to make possible higher living standards for individual men, women and children." The 1974 paper, "Population Policies and Economic Development" (Report No. 481), noted that: "In most countries present high levels of unemployment make it difficult to increase the employment of women in the modern sector. Lower growth rates of working age population would increase the opportunities for this. Women with modern sector employment are likely to have a lower fertility than they otherwise would have. As in education there are elements of a self-perpetuating cycle in the relationship between unemployment and high fertility" (see p. 31).

OMS 3.74 on population (November 1977), drawing on the Population Sector Policy Paper, suggested possible interventions based on the "strongest current hypotheses as to which socio-economic changes have the strongest influence in lowering fertility," including the increase of literacy, particularly of females, and "the spread of female nonagricultural employment outside the home" (see para. 5). Actions aimed at longer-term stimulation of demand for family planning included measures to "improve the social status of women and to broaden their economic roles, giving them alternatives to child-rearing" (see para. 6).

In most cases, women were mentioned in passing, as a sub-set of the general population. For example, OMS 2.12 on project generation and design (August 1978) states that: "In agriculture, introduction of high-yield varieties, heavy mechanization, or more intensive cropping or livestock management practices may . . . entail changes in the functioning of rural societies, the nature of their year-round activities, the risks to the poorest farmers, and the division of labor within the family, with possible negative consequences for women and children" (see para. 19b); "In rural development and urban projects, it is important to know as much as possible about the . . . formal or informal institutional framework in which [the people] operate, including the different family and commu-

(Box 2.3 continued)

nity roles of men and women" (see para. 21a).

The first explicit directive to consider women in the project cycle was provided in OMS 2.20 on project appraisal (January 1984). Under sociological aspects of projects, it instructed staff to consider socio-cultural and demographic factors, social organization of productive activities, cultural acceptability of interventions and the social strategy for project implementation. Special attention was given to women:

Women are sometimes a particularly important group of project participants and beneficiaries. Appraisal should therefore examine whether the project design takes into account adequately (a) the local circumstances that impede or encourage the participation of women; (b) the contribution that women could make to achieving the project's objectives; (c) the changes which the project will introduce that might be disadvantageous to women; (d) whether the implications for women are included in the provisions for monitoring the impact of the project (see para. 62).

The proactive years

Through the 1980s and into the 1990s, fragments of guidance continued to be provided; in most cases, women were cited with other areas of special emphasis or other disadvantaged and vulnerable groups for illustrative

purposes. For example, OD 2.10 on country strategy papers (September 1990) stated that "Additional areas of special emphasis such as the development of the private sector, social dimensions of adjustment, environment, the role of women and food security, are integrated and highlighted in the discussion" (see para. 7). Even OD 4.15 on poverty reduction (December 1991) did not address gender issues, but briefly called for attention to women when analyzing regulatory barriers in labor markets and the impact of sector policies. The section on policy dialogue did, however, specify that agreement on policy priorities should be based on a discussion of, among other things, the role of women in the economy. Other operational directives include women in lists of vulnerable peoples who should be protected from harm (OD 4.30 on involuntary resettlement, June 1990) or could receive targeted assistance (OD 8.30 on financial sector operations, February 1992). On the other hand, the operational policy on forestry (4.36, September 1993) and the OD on nongovernmental organization involvement in Bank-supported activities (14.70, August 1989) point out that women, or women's associations, can be powerful agents of development.

Only two documents focused on gender issues. A 1990 operating memorandum instructed the regions to appoint WID coordinators and resource persons. The 1994 operational policy (OP 4.20) is the first operational guidance specifically focused on gender issues.

logical context of overall social analysis. The link between social analysis and attention to WID was also reflected in the objectives of Operations Policy staff and Project Advisory staff, which advocated “greater awareness of the socio-cultural dimensions (in particular the role of women) of the development process and how these affect the feasibility and impact of projects.”¹⁴

While Bank rhetoric advocated paying more attention to people in general and women in particular, however, the institution was being criticized for not bringing more sociologists and anthropologists on staff and not paying attention to social analysis. Other agencies had developed comprehensive gender-related policies or guidelines or would do so following the 1985 conference. The Bank would concentrate on building up its body of research.

Operational evolution: first efforts

The key principles elaborated during the reactive period were reflected in the changing distribution of projects with gender-related action over regions and sectors. Changes during the reactive years are described in this section for all investment projects with gender-related action, and a

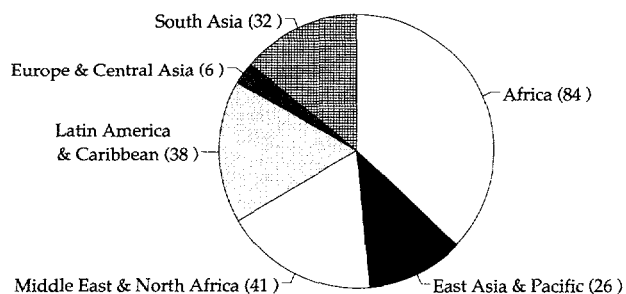
detailed review of projects in the old cluster identifies gender actions and the factors associated with their effective implementation. The overall evolution of the portfolio from 1967 to present is discussed in Chapter 4.

*Gender-focused ESW.*¹⁵ Starting in FY76, a few examples of WID-focused ESW were found. These cases occurred mostly in countries with a relatively high number of gender-related action during these early years. For example, of the sixteen projects with gender-related action in Kenya, more than half were approved before FY86, mostly in the human resources sector. In Yemen, fourteen of twenty-eight gender-action projects were approved before FY86, and a sector report was released in 1984. Bangladesh, Indonesia, Kenya, and Pakistan—countries with early WID sector work—remained active throughout the study period, while a 1977 issues paper in Ghana on women and employment was an isolated case. Half (nine out of nineteen) of WID-focused ESW in the early years was in Africa and a quarter (five out of nineteen) was in Asia.¹⁶

Several early cases focused on the effects of new technology on women’s agricultural or other employment opportunities. Traditional women’s concerns (stoves, vegetable gardens, household food-processing technology) were also mentioned. Early ESW having to do with women, however, is so diverse in scope that no pattern can be identified.

Temporary increase in projects with gender-related action. Of the 615 investment projects approved between FY67 and FY93 with some type of gender-related action, only 227—or 7 percent of the investment portfolio—were approved during the reactive

FIGURE 2.1: INVESTMENT PROJECTS WITH GENDER-RELATED ACTION, ACROSS REGION, FY67–85



years. None of these projects focused on women only. Their distribution over time, countries, and sectors reflected the Bank's ambivalence toward gender-related issues during those years.

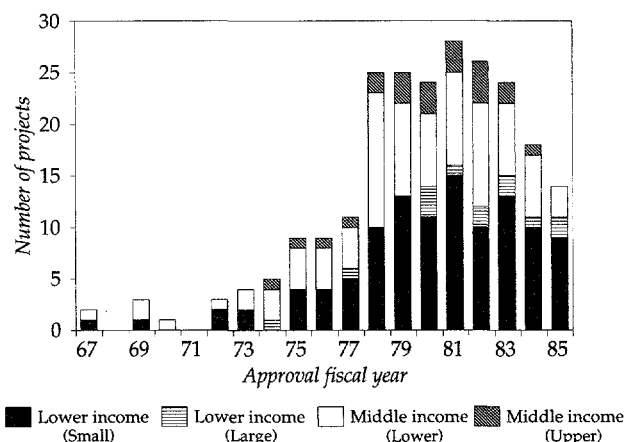
More than twice as many projects with gender-related actions were approved each year from FY78 to FY83 than in earlier years, but this increase was not sustained after FY84. While systematic monitoring was not yet in place, the data uncertainties regarding the number of gender-action projects are the same throughout the period. The pattern, if not the absolute numbers, is therefore valid. The decrease for FY84 to FY88 shows that the efforts of the late 1970s had not succeeded in integrating gender issues into project design.

Projects with gender-related action were concentrated in Africa (37 percent) and Asia (26 percent), and in low-income countries (see figures 2.1 and 2.2). A few countries—Bangladesh, Brazil, Indonesia, Kenya, and Yemen—had multiple projects with gender-related action.

Link sectoral distribution and OMS. The sectoral concentration announced in various statements of the period¹⁷ is reflected in the portfolio (see Figures 2.3 and 2.4). The concentration on education reached a peak in FY79-81, following the 1977 issuance of the population OMS that identified the education of girls as a factor in lowering fertility, and the same year's guidelines to staff by Central Education. While the absolute number of projects is small, especially in the urban sector, the choice of strategies is clearly in line with the guidelines.

High proportion of area development projects. More than 60 percent of the completed agriculture projects with gender-related action were area development projects, a much

FIGURE 2.2: INVESTMENT PROJECTS WITH GENDER-RELATED ACTION, ACROSS INCOME GROUP, BY APPROVAL YEAR, FY67-85



higher proportion than for all agriculture projects approved between FY67 and FY85. This concentration was in line with the 1975 statement linking the 'new style' rural development projects and attention to women. Gender issues were recognized early in agriculture, a sector for which women's involvement is often clearly visible. Furthermore, area development projects were expected to address the availability of services and infrastructure directly and indi-

FIGURE 2.3: INVESTMENT PROJECTS WITH GENDER-RELATED ACTION, ACROSS SECTOR, FY67-85

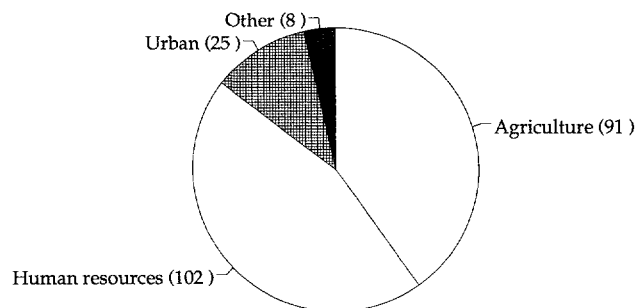
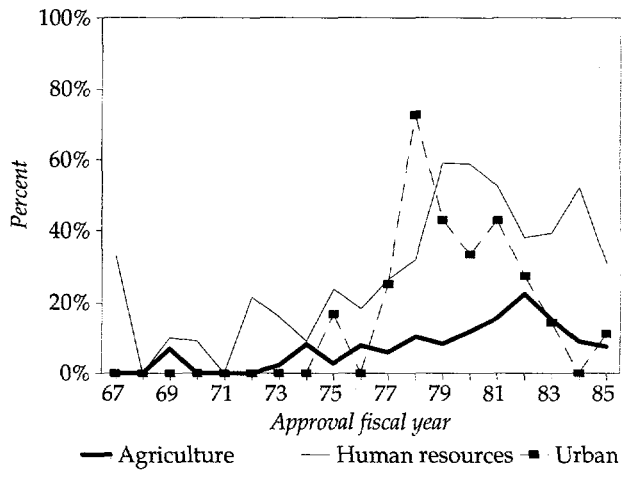


FIGURE 2.4: PROPORTION OF PROJECTS WITH GENDER-RELATED ACTION FOR SELECTED SECTORS, BY APPROVAL YEAR, FY67-85



rectly related to agriculture and rural development. Women, through their reproductive, productive, and community roles, would be found to be involved in many aspects of an area development project.

Unfortunately, the problems later found associated with area development projects¹⁸ also occurred in area development projects with gender-related action. These projects received low OED performance ratings, although no more so than for the total area development portfolio (see Figure 2.5). Since they were the largest single group of projects, the area development projects bring down the overall performance of projects with gender-related action.

The Annual Report on Portfolio Performance, project completion report (PCR), and performance audit report (PAR) ratings of projects with gender-related action were similar to those for the portfolio, in part because of the concentration on area development projects, mostly in LAC and Africa. Of course, success in achieving any objective

depends on many technical, economic, and institutional factors outside gender attention, and attention to gender issues by itself does not determine results. Moreover, the achievement of overall project objectives does not indicate whether the gender-related actions were successful, or indeed if they were implemented at all. Actual achievement of gender-related actions is discussed below for the "old" cluster of projects.

The old cluster of projects

Projects cited in the 1979 'Invisible' Woman publication¹⁹ were concentrated in Africa and LAC (12 and 8 projects, respectively), in the human resources and agriculture sector. A few country departments are represented by several projects: five in Country Department III, Latin America and the Caribbean Region (LA3), four in Country Department I, East Asia and Pacific Region (EA1), and three each for Occidental and Central Africa Department (AF1), South-Central and Indian Ocean Department of the Africa Region (AF3), Southern Africa Department (AF6), Country Department III of the East Asia and Pacific Region (EA3) and Country Department II, South Asia Region (SA2).

The most common objectives were focused on providing access to some basic needs, including primary education, nutrition advice, maternal and child care, and functional literacy. The same type of objectives could be found in different sectors. For example, maternal and child care was provided by the Thailand Population Project (C0767), and the Bolivia Urban Project (C0762), but the training of mid-wives and birth attendants was provided under the Cameroon Zapi Integrated Project (C0776). The Morocco Rabat Urban Project (L1528) included training women in functional literacy. Increasing future employment opportu-

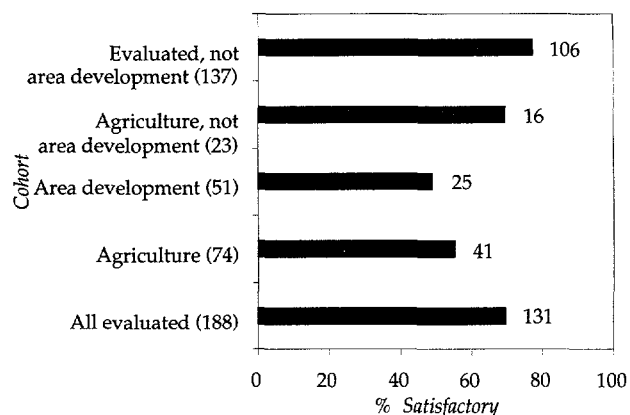
nities was a frequent objective for education projects (teachers training, vocational training), but also in two population projects (vocational training in Bangladesh (C0533), and training of nurses and mid-wives in Thailand (C0767).

In education, three types of activities were found (in various combination): increased recruitment of female teachers and/or better training, building of separate schools or facilities so that parents will send girls to school, and separate targets for boys and girls school attendance. These strategies were in line with the 1976 guidelines.

In agriculture and health, projects frequently introduced targeting services or training for women, or recruitment of female staff. The focus was on women's reproductive roles rather than their productive roles. For example, area development projects worked with "Mothers' Clubs" to provide advice on nutrition or home economics rather than on farming techniques and use of inputs, even for women farmers. There was no search for the "new potential roles" suggested in the education guidelines.²⁰ The Bolivia Ulla Ulla Project (C0762, L1510) offered extension advice to women only on nutrition and home economics activities, despite its poverty-alleviation objectives and the fact that women in that region tended household livestock. The Burundi First Forestry Project (C0918) attempted to provide clay stoves for rural households but did not seek to involve women in forestry work.

Projects listed in the *'Invisible' Woman* document were given as examples of best practices. They were expected, by definition, to include clear, specific gender-related action. Yet of the 36 projects cited, only 20 had explicit plans for such action in their staff appraisal reports (SAR) and presidents' reports.²¹ Some projects with no plans for

FIGURE 2.5: OED RATINGS FOR COMPLETED AREA DEVELOPMENT AND OTHER PROJECTS WITH GENDER-RELATED ACTION, FY67-85



specific action did lead to action beneficial to women. For example, the Botswana Francistown Urban Development Project (C0471) had no discussion of gender or WID issues in project documents. Yet the PCR and PAR identified a positive impact on women, through a legal change that made it possible for married women to take financial responsibilities.

On the other hand, some projects that had good attention to gender during appraisal, such as the Kenya Bura Irrigation Project (C0722), encountered problems not related to the gender actions during implementation. During preparation, a Social Impact Reconnaissance Survey was conducted—an early example of detailed attention to social issues during preappraisal. The social scientists looked at potential impact on women and the household. As a result, the baseline survey identified the fact that women did 75 percent of the labor on cotton, but that male heads of households received payment for the crop. This raised the question of women and children not being compensated for their work. The

scientists looked at potential impact on women and the household. As a result, the baseline survey identified the fact that women did 75 percent of the labor on cotton, but that male heads of households received payment for the crop. This raised the question of women and children not being compensated for their work. The report discussed how the consequences of large payments to men could be used to increase the size of household (more children, polygyny) and keeping children out of school.

A more detailed analysis of projects in the old cluster projects found that 11 projects (31 percent) paid at least some attention to gender during supervision. However, this percentage increased to 50 percent in projects whose SAR clearly identified some form of gender-related activity.

Individuals committed to promoting the roles of women were often instrumental in bringing gender issues to a project. The better examples of gender-related action can be traced to individuals who were hired to conduct a social science analysis, or who were among the WID activists involved in the informal lunch groups.

The overall outcomes of projects in the old cluster are similar to those of the investment portfolio: 20 audited projects had a 74 percent satisfactory rating as compared with the portfolio rating of 75 percent. At the PCR review, 86 percent were rated satisfactory. However, the satisfactory achievement of overall project objectives does not necessarily reflect the success of gender-related actions.

Of these early projects, ten had gender components that were successfully implemented, with likely sustainability in only three. Factors associated with satisfactory achievement

in gender-related action were: strong country commitment to the gender component, strong country commitment to the project in general, and—to a lesser degree—good supervision of the gender component. This evidence is confirmed on a larger scale by the review of the new cluster; its implications will be discussed in Chapter 3.

Notes

1. Address to the Economic and Social Council (UN), 1974.
2. When the secretary general of the conference requested technical and financial support, the Bank president rejected the funding request and declined an invitation to address the conference, but he suggested the possibility of financing a research project on women and education. Although this was never done, the Bank did send a two-person delegation (staff members in the International Relations Department and the Population Department). One task manager for Latin American and the Caribbean Regional Office (LAC) also attended a parallel conference, organized by nongovernmental organizations, at their invitation.
3. Memorandum from the International Relations Department to Personnel, February 3, 1975.
4. Memorandum from the International Relations Department senior advisor on Policy Planning to the International Relations Department director, July 8, 1975.
5. Memorandum from the International Relations Department advisor to files, February 7, 1975.
6. This included an environment advisory post, created in 1970.
7. This publication was the Bank's contribution to the UN conference in Copenhagen.
8. The Bank translated it into Spanish and French, and the Japanese translated and published it at their own expense. Over 4,000 copies were sent to the Copenhagen conference. As the WID advisor remembers it, however, the *'Invisible' Woman* was used more systematically outside than inside the Bank.
9. "WID: Its Evolution and Future in the Bank," WID advisor's exit report, May 1985, p. 15.
10. Introductory remarks to the operational vice presidents, July 11, 1985.
11. Massachusetts Institute for Technology, 1977.
12. September 23, 1980 memorandum by the Status of Women Working Group chair reporting on the September 10 meeting.
13. President's closing remarks, Annual Meeting, September 30, 1983.

14. Projects Policy Department Strategy Memorandum, October 16, 1984.

15. This report does not assess attention to gender in ESW in general, but only the contribution of gender-focused ESW to Bank lending.

16. Table 3.1 in Chapter 3 shows the overall distribution of WID or gender ESW across regions for the entire study period.

17. Sectors include education and training, agriculture and rural development, urban development, employment and

income-generating activities, and population, health and nutrition.

18. OED, *Lessons and Practices*, No. 3, 1993.

19. See Annex 2 for full data on the portfolio and cluster characteristics.

20. Guidelines covered nonformal and rural training.

21. These 20 projects would have received a WID rating of 2, using the current rating process. For a discussion of the rating process, see Box 1.1 and Annex 1.

3. The proactive years, 1985-94

During the second half of the 1980s, the Bank formally increased its resources and attention devoted to gender-related issues. Basic themes already established (such as mainstreaming, efficiency, poverty alleviation, equity, choice of key sectors, and education's link to fertility) became integrated into a comprehensive program of joint action by a central WID division and the regions, with explicit and sustained support from senior management and the Board. Research work validated the relevance of gender issues for development. The focus on WID began to give way to a broader definition of gender issues. As a result, country-level assessments of these issues and investments in projects with gender-related action increased sharply.

The 1985 Nairobi Conference on the UN Decade for Women spurred efforts in the international community and the Bank (see Box 3.1). Conference participants agreed that, despite the symbolic value of the International Decade for Women in raising consciousness, concrete progress had fallen short of expectations. International efforts paralleled those of the Bank as described by the first WID advisor: "Although several agencies, in response to the pressures of the Decade, had established focal points for women's activities, insufficient tenure and

resources had limited their effectiveness."¹ Following the adoption of forward-looking strategies to be achieved by the year 2000, many development agencies issued formal statements and plans of action.

Conceptual and institutional evolution: a process of legitimization and verification

A new team

With the Bank's first WID advisor due to retire in late 1985, management focused on finding a successor. Yet several candidates, both from inside and out, refused to take the job unless more resources were made available. The Bank appointed a senior economist in September 1985, and within months the WID advisor's functions were redefined. Project monitoring, advice to operational staff, external relations, information dissemination, and staff training were scaled back. Instead, efforts would focus on demonstrating how attention to WID contributed to development objectives, in terms acceptable to economists, and on providing clear operational guidelines. The concepts remained those of the previous period: efficiency, equity, and anti-poverty rationales; a mainstreaming approach; and

a focus on key areas of agriculture, education, and population, health, and nutrition. But the implementation process would be new: The WID office would provide leadership and seed money, but efforts on the ground would be led by the regions.

Mr. Conable became president of the World Bank a month before the new operational approach to WID was approved. In his first address to the Board of Governors in September 1986, he announced his intention to increase the Bank's emphasis on women, the environment, and population. By the end of summer 1986, the senior vice presidents and operational vice presidents had formally endorsed the Bank's first coherent plan for integrating attention to gender issues in the work program of the regions (see Box 3.2), and WID was included among areas of special emphasis.

The Bank's new operational program was made public in the president's address to the Safe Motherhood Conference in Nairobi (February 1987), when he vowed "the World Bank will do its part." Specifically, he mentioned the need for preparing country action plans, increasing attention to women in policy dialogue, encouraging policies that provide incentives for women and the means to respond, developing programs to improve agricultural and nonagricultural employment, promoting education and training for women and girls, and doubling lending for PHN by 1990. With the president's consistent encouragement, management support for WID was reinforced.

Starting in the late 1980s, the Board and Development Committee also paid increasing attention to gender issues. Over the years the Board had endorsed attention to women in development and expressed concern that Bank action was insufficient (see Box 3.3).

After the mild interest of the 1970s, and the near disappearance of the subject in the early 1980s, the Board's concern for women's issues became consistent and strong.

At the beginning of 1987, the stage was set for an unprecedented effort. Mr. Conable's early statements, like Mr. McNamara's MIT address ten years earlier, made WID issues visible in the Bank. But this time the president followed through by designating WID one of four formal areas of special emphasis in 1987, for the first time conferring legitimacy on the topic and requiring Bank managers to show that they were addressing the issues in their portfolio. By 1990—in a break with past trends—it was the Board and the president who were pushing for faster implementation. In April 1990, the Board, concerned that Bank projects submitted for approval frequently ignored WID issues, requested a progress report on what had become known as 'the WID initiative.' The Development Committee, which had shown little concern with such issues, agreed to discuss women's roles at its September 1990 meeting for which an issues paper was prepared. Updates of these reports were again requested and presented in 1991 and 1993.

The 1990 progress report to the Board (covering FY88-89) stated that the percentage of projects with gender-related action at approval had doubled from 10 to 20.² Only a quarter of economic and sector work reports discussed WID issues. The 1991 report to the Development Committee noted that in FY91, projects that had targeted women had increased to 40 percent of those approved. They were discussed in 62 percent of ESW reports and in nearly three-quarters of country macroeconomic reports. Presentation of gender-disaggregated indicators was becoming common. The 1993 report to the Development Committee indicated that—

BOX 3.1: CHRONOLOGY OF THE PROACTIVE YEARS, 1985-94

Year	Major speeches/publications/policies/OM5s/PNs/ODs	Institutional changes and events	Outside events
1985 ^a		WID advisor retires, replaced by Bank staff (September). A new "more operational approach" is proposed for the Bank's WID Program (November).	UN Voluntary Fund for the Decade for Women (\$12 million annual budget) becomes the UN Development Fund for Women (UNIFEM) (July). World Conference to Review and Appraise the Achievements of the UN Decade for Women held in Nairobi; World Bank sends a six-person delegation including the vice president for EAP, the first senior Bank official to address a UN Women's Conference (July 15-26). Asian Development Bank issues WID policy statement.
1986		The new approach is endorsed by the operational vice presidents, who designate a WID coordinator in each region (August). Women in Development unit created in Projects Policy Department, with three new staff positions added (December).	WID mandate in Canadian International Development Agency, Germany, and Ireland.
1987	President addresses the Safe Motherhood Conference in Nairobi, cosponsored by the World Bank (February).	Bank WID unit begins rating projects for their attention to women. The WID unit becomes a division in Population and Human Resources (PHRWD) when reorganization takes effect (July).	Inter-American Development Bank issues WID policy paper. Evaluation of USAID WID program undertaken.
1989	President calls for country assessments of women's roles in development (April).		
1990	President requests that attention to WID be accelerated (February). First progress report on WID submitted to the Board (February); first Board seminar devoted to WID (March).	Positions for regional WID coordinators are provided to each region.	WID mandate included in European Economic Community Lomé IV Convention.

while percentages were similar—sectoral coverage had been extended considerably.

Peer reviews of the 1990 report found it "too optimistic or 'self-congratulatory' in tone, . . . [especially since] the WID initiative was not yet 'well in hand' throughout the Bank and that serious constraints and prob-

lems remained to be addressed to make it succeed,"³ and that plans for WID action might not be a reliable indicator of activity at the country level. The report was transmitted to the president's council with the note that: "The WID initiative is still at an early stage and fragile. Actual results remain to be seen, and OED stresses the

(Box 3.1 continued)

Year	Major speeches/publications/policies/OMSs/PNs/ODs ^a	Institutional changes and events	Outside events
	First OMS memorandum on WID by senior vice president, Operations. 1990 progress report issued as a World Bank publication. Issues paper submitted to the Development Committee for its first meeting to consider WID (September). OD 2.10 country strategy paper includes women in areas of special emphasis.		
1991	Second progress report submitted to the Development Committee (September). OD 4.15 on poverty reduction highlights attention to policy, legal, and regulations framework and women's status.		
1992	Portfolio Management Task Force releases report. World Bank chief economist and vice president for Development Economics addresses the annual meetings on "Investing in All the People: Educating Women in Developing Countries" (September).		1992-94: DAC undertakes evaluation of bilateral agencies' experience. WID mandate in France, bilateral assistance. Evaluation of UNICEF program on women.
1993	Board seminar discusses shift from WID to gender approach (July). Third progress report submitted to Development Committee.	The WID Division becomes a thematic group in the Vice Presidency for Human Resource Development and Operations (HRO) (January). WID team is renamed Gender Analysis and Policy (GAP) team.	Evaluation of Canada WID program.
1994	Policy paper on gender and development approved by the Board (April).		1994-95: Series of preparatory meetings for the 1995 Beijing conference.

a. Events for 1985 are repeated since they are pertinent to both the reactive and proactive periods.

need for effective supervision. Interest in WID among Bank staff seems to be genuinely on the increase, but with the press of competing priorities, continued emphasis from management is needed to maintain momentum until operations mature and yield results. Then the initiative should stand or fall on its merits."⁴

The president deplored the slow pace of progress: "I am concerned about the effectiveness of a low-key approach. While I have no doubt that from an institutional point of view this gradual approach is painless, it was the approach for fifteen years to environmental problems, without notable success."⁵ To speed the pace, he proposed four

BOX 3.2: CORNERSTONES OF THE 1986 APPROACH

The work program approved in 1986 aimed to develop a conceptual framework for the Bank's work on WID issues and a portfolio of operational examples in key sectors. For nearly eight years, policy analysis, research and operational support would be focused in key "high pay-off" sectors, beginning with agriculture and education; by 1990, the five priority areas were female education, health, access to credit, agricultural extension, and improved access to the labor force. The importance of overcoming barriers to women's access to social and productive services would be increasingly stressed. Main activities included:

WID country strategies, to provide a comprehensive analytical basis for advice and lending. A combination of Bank and trust funds led to completion of countrywide WID assessments and country studies. They have proved useful in identifying cross-sectoral issues, in moving the Bank toward increased attention to legal and regulatory factors, and in establishing dialogue with the borrowers.

Research on key sectors, including the link between education and fertility, women's productivity in agriculture, credit and female entrepreneurs, and WID issues in economic and sector analysis. This would lead to: (a) preparation of operational sectoral guidelines and (b) a policy paper.

"Best efforts," a study of "best practice" projects to mainstream women into Bank operations. The study was to identify small-scale experiences in Bank projects that provide promising approaches for large-scale efforts. Funding from the government of Norway enabled studies of 10-15 projects in agriculture, education, and population, health, and nutrition, mainly in Asia and Africa. The "best practice" projects were intended to provide a basis for generating sectoral guidelines. Over the years, best practice documentation became increasingly confused with guidelines and policy development.

"Safe Motherhood," a thematic initiative on maternal health and family planning. The Bank, the United Nations Fund for Population Activities, and the World Health Organization sponsored a worldwide Safe Motherhood Conference in Nairobi in February 1987. Addressing the conference, the Bank's president announced the increased focus on women and the decision to double lending for population, health, and nutrition, a goal which was surpassed over time. The conference helped identify strategies for improving service delivery, and spawned a series of national safe motherhood conferences. While the Bank was criticized by WID activists for reinforcing its focus on reproductive roles, the initiative raised the visibility of women's health issues.

areas of action: "Strengthening of the analytical base in light of our own and others' experience, and the articulation at staff and managerial levels of our findings and policies . . . ; meaningful and systematic integration of Women in Development aspects in all our Country Programs; country by country assessment of specific legal and regulatory problems; and assurance that Women in Development lending components and economic and sector work meet the high quality standards expected from the World Bank."

Pleased with the report, the Board yet noted that results were still modest after fifteen years, and called for the Bank to move forward with implementation. They asked how to translate plans into operations, and how management could support gender-related efforts with staffing, resources, and supervision. Executive directors echoed management's caution about alienating staff and borrowers, but called on the Bank to accelerate its efforts in dealing with gender issues.

The progress report and the issues paper for the Development Committee both used the familiar rationale for increased interest in gender issues: the relevance of women's productive and reproductive roles for development objectives, the need for political will to break the vicious cycle that widened the disparity in benefits between men and women, and plans to focus on mutually reinforcing efforts in female education through the secondary level, "safe motherhood" (family planning and mother and child health), agricultural extension and other services, credit and support services for female entrepreneurs, and access to labor markets. In 1979, efforts were focused on the education, agriculture, urban development, employment, and population, health, and nutrition sectors.

By 1987, urban development was no longer a focus area, and by 1993, female credit and entrepreneurship programs would be added to the list (see Box 3.4).

Institutional changes: increased resources and decentralization

Unlike the 1970s, the strong support from management and the Board was accompanied by increased Bank resources and priorities, to which the WID advisor was able to add large trust funds and United Nations Development Programme funding for research programs.⁶ While the first WID advisor had never had more than half a research assistant (and limited short-term consultants), a new WID unit was established with three professionals in January 1987 in the Projects Policy Department (PPD). In July 1987, the unit became the WID Division in the Population and Human Resources Department (PHRWD). Its professional staff was increased to seven in 1988 and to eight in 1990.

The link between Operations and the central unit was also formalized. The grassroots staff groups of the early 1970s had not succeeded in working with the WID advisor. Now managers rather than staff oversaw interaction between the center and Operations. In 1986 (following the operational vice presidents' approval of the WID work plan), each region appointed a WID coordinator, often the assistant director of projects.⁷ But the most innovative change—the creation of full-time slots for WID advisors in each region—would not take place until after the president and the Board became concerned with the slow pace of implementation in 1990.

In April 1990, the senior vice president for Operations issued an operating memoran-

BOX 3.3: BOARD DISCUSSIONS OF WID OR GENDER ISSUES

Discussions of WID or gender issues have occurred during Board meetings and seminars since 1973. The frequency of references increased over the years, mirroring trends in the Bank. Highlights include:

May 1973: Probably the first deliberate measure to increase women's access to agricultural training is highlighted in the presentation of the Zambia Education III Project, and lauded by a Board member.

April 1975: A statement on the Percy Amendment from the United States Alternate Executive Director, who requested a progress report on WID. The president agreed that the Bank would do more to understand and act on WID issues.

May 1977: In the context of a Malaysia National Extension Project, which overlooked the role of women in agriculture, and the

Lesotho Second Education Project, the first request to deal explicitly with barriers to reaching women in future president's and appraisal reports.

October 1981, July 1982: The Board criticized the outline of the 1982 *World Development Report* for omitting women. Promises were made to highlight women's roles in agriculture. When the report was discussed, a Director noted that not only had there been no mention of women in agriculture, but none of women in general.

March 1988: In a review of an OED report on rural development, speakers welcomed agreement on the need for more beneficiary involvement in project design, but noted that the response on women still was weak; the solution was not a larger WID Division, but hiring more staff with sociological skills and involving women in project design.

dum directing the regions to appoint WID resource persons.⁸ Each of the four regions was given one extra post for a WID coordinator, and each country department was asked to designate a WID resource person "whose job would be to ensure the systematic integration of WID concerns in the departmental lending and ESW programs (and) liaise with the newly-appointed regional WID coordinators and with the WID unit in Policy, Research and External Affairs."⁹ The regions' individual reactions to decentralization varied and in the process several innovative features were tested.

The Asia and Africa regions set up small teams in their technical department to provide technical support, conceptual leadership, and training to regional staff. Local WID coordinators were also posted at regional missions in Bangladesh, India, Indonesia, and Nigeria. A full-time WID coordinator was recruited in the Europe, Middle East, and North Africa region in 1990, but this was scaled back later. In the Latin American and Caribbean region (LAC), coordination and advice on gender issues was provided through part-time assignments in the technical department and some country departments.

(Box 3.3 continued)

Spring 1989: On several occasions speakers welcomed the increased attention to WID through programs of special emphasis.

March 1990: The first progress report on WID was discussed in the first Board seminar devoted to the topic. Expressing concerns about adequate resources and staff training, the executive directors endorsed mainstreaming attention to WID in normal Bank operations, and the focus on education, health, credit, and agricultural services. Speakers called for increased monitoring of WID efforts.

September 1991: In discussing the 1991 progress report on WID to the Development Committee, executive directors emphasized the need to maintain the momentum of the WID initiative, noting that progress was measured in terms of analysis and intentions that do not necessarily translate into operations and dollar commitments.

March 1993: The Board was briefed on the new Human Resource Development and Operations vice presidency, including the thematic group on women in development. One speaker pointed out that progress on integrating gender issues into operations had fallen short of expectations.

July 1993: Informal Board seminar on gender and development.

January 1994: Board discussion of the approach paper for a policy paper on gender. Speakers welcomed the paper and supported plans for increased training and monitoring of progress.

April 1994: Board approval of the policy paper *Enhancing Women's Participation in Economic Development*.

Source: Internal database, Executive Directors Library.

Recent innovations

The 1993 reorganization led to changes in the regions and central unit. The staff and resources of the Africa team decreased to two professional positions, but country departments increased the gender responsibilities of some staff, including full-time assignments in AF1 and AF6. The Asia team continued to provide support to the two Asia regions from the Human Resources Division. After the Europe and Central Asia (ECA) and Middle East and North Africa (MNA) regions separated, the two regions maintained focal points for gender issues

and a steering group on gender, but did not set up a core of full-time specialists.

In the center, the focal point for gender issues has consistently remained in the vice presidency in charge of overall Bank policy. The 1993 reorganization transformed the PHRWD Division into a team, located in the Education and Social Policy Department (ESP) of the Human Resources Development and Operations Policy Vice Presidency. The (renamed) Gender Analysis and Policy team (GAP) now has six high level positions, down from the maximum of eight in PHRWD, but ESP staff assigned to the

Box 3.4: KEY AREAS OF CONCENTRATION IN 1979, 1987, AND 1994

1979	1987	1994
Education and training	Education	Education
Agriculture and rural development	Agricultural extension and credit	Agriculture
Urban development	—	—
Employment and income-generating activities	Training for nonfarm employment	Formal wage labor markets
—	Credit	Financial services
Population, health, and nutrition	Population, health, and nutrition	Health and nutrition

Sources: 1979 *Invisible Woman* document; 1987 PHRWD work program; 1994 policy paper.

Education, Poverty, and Labor teams also contributed to gender work, in cooperation with the GAP team.¹⁰ PHRWD staff had reported that interactions within their department and other central departments fostered closer attention to cross-sectoral synergies. Similar interactions continue today, for example the joint monitoring of poverty and gender within the Education and Social Policy Department, and involvement of the four ESP teams in the preparation of a special gender study for the 1995 United Nations conferences in Beijing. A joint paper on women and participation is being prepared by GAP and the Social Policy and Resettlement Division, Environment Department.

The Asia and Africa regions developed comprehensive work programs,¹¹ including a systematic review of the initial executive project

summary. By reviewing all such summaries, the gender teams could identify any "opportunity for enhancing the role of women. . . (or possible). . . negative impact on women,"¹² while it was still possible to influence the project. The gender teams initiated contact with the task manager and offered advice and assistance if needed, for example, if a potential or risk was not already being addressed. Projects continued to be monitored during preparation and appraisal. The PHRWD monitoring system, based on reading project documents as submitted to the Board, documented good intentions. The initial executive project summary review made it possible to influence project design.¹³ This process seems effective and HRO is in the process of expanding it Bankwide.

The Asia and Africa teams added infrastructure (in Africa) and resettlement (in Asia) to

the key areas of focus common throughout the proactive years.¹⁴ They initiated analytical work leading to guidelines and improved documentation of women's status and activities. For example, Asia conducted research and developed guidelines on credit and financial services for women micro-entrepreneurs. Africa initiated further analysis of existing sectoral and household data sets, including those obtained through earlier major data collection efforts.¹⁵ The Africa team also worked on the legal status of women, in cooperation with African researchers and jurists. An African policy framework for gender-responsive development is under preparation.

The Europe, Middle East, and North Africa region WID coordinator had been reviewing the initial executive project summaries, but this work did not continue after the region shifted from a full-time WID coordinator to a part-time resource person and, later on, a steering committee. In ECA, a WID assessment for Russia brought to the fore the difficulties that women are encountering in economies in transition, and a WID assessment for Turkey highlighted the implications of employment regulations and legal framework for women. ECA started implementing a new two-prong approach in July 1993, including: (a) a special fund to support WID work to provide seed financing for new areas of inquiry, and (b) periodic reviews to monitor the integration of WID issues in the portfolio and into overall economic analysis. Proposals approved so far include: Women in the Labor Market in the former Soviet Union; Changing Patterns of Childcare and Reproductive Health in Eastern Europe; Gender and Property Rights in Transitional Economies: A Focus on Women and Agrarian Reform.

In MNA, a task force developed a gender strategy¹⁶ endorsed by the management team. Seminars and training workshops are

being used to emphasize the commitment of senior management to the issues, and to provide technical skills directly applicable by task managers (in cooperation with the central GAP team). The Country Department II of the Middle East and North Africa region's (MN2) Gender Strategy for FY95 included plans for cross-sectoral gender implementation reviews at the national level.

In LAC, sectoral work on gender issues often covered the entire region or several countries with common features, for example, on gender issues in the labor market. The region is focusing on key areas with maximum potential impact: early education and health interventions, removing impediments to access to higher education, labor markets, and equal pay. Several social funds projects involve nongovernmental organizations (NGOs), which help communities identify and implement activities tailored to the needs of the poorer households.

Main outputs of the proactive years

High-level support, adequate resources, and a work program jointly agreed upon by the center and the regions were followed by a large increase in outputs in the portfolio, and in discussion papers, guidelines, and dissemination efforts. By the late 1980s, unlike during the reactive period, the demand from the regions for practical, easy to use guidance was great.¹⁷ Staff viewed guidelines as an empowering tool—"If we in the regions were armed with guidelines/examples, the regions themselves would be in a better position to screen operations as they develop."¹⁸ The original work program had been ambitious, and it took longer than planned to complete the research tasks, develop guidelines and a formal policy, and meet the demand for operational support.

To provide operational support. Specialized staff in the center and in the regions pro-

vided technical support to the regions throughout the series of WID and gender assessments (discussed in the next section) and for numerous projects. Operational guidelines were prepared, for example, in forestry¹⁹ and agriculture.²⁰ The experience accumulated through research and operational support provided the foundation for a policy paper issued in April 1994. A forthcoming "special study" will bring together the results of research and best practices projects on key sectors.

Regional staff have provided operational support since 1990 through direct involvement in sector work, WID assessments, poverty assessments, and projects. They have also developed guidelines focused on regional needs. The Africa gender team has been particularly active in providing operationally oriented information on gender to the country departments, through: (a) information sheets on sectoral and cross-sectoral issues (such as network of legal aid clinics for women in francophone Africa, women and the environment, women and Auto Immune Deficiency Syndrome); (b) country information sheets; (c) gender analysis of primary sources; (d) program information; and (e) working documents.

To clarify rationale and establish Bank policy. PHRWD considered that, to convince Bank economists that WID was a legitimate development concern for the Bank, a sound conceptual and evidential base would be required before a policy paper and staff guidelines could be prepared. In 1986, the advisor wrote, "Preparing a policy paper would take massive effort, substantial budget, and considerable time . . . It makes better sense to develop operational experience to build a strong base for a policy paper (or a World Development Report) in a year or two."²¹ The 1986 work program included lengthy "best practice" and policy studies

that would synthesize the results of research and operational support.²²

Major research work was undertaken as planned, but took longer to complete than expected. Three main outputs of PHRWD work covered economic and sector work, the link between education and fertility, and women's productivity in agriculture. The first of these outputs provided staff with guidelines on how to address WID issues in economic and sector analysis.²³ The second analyzed econometric evidence to demonstrate the high returns from investing in girls' education. High quality publications and a formal endorsement by the Bank's lead economist during the 1992 annual meetings gave these findings a level of visibility and legitimacy they had never had.²⁴ The third main output was based on original research conducted with United Nations Development Programme funding in Africa. It showed that women's productivity in agriculture could be higher than that of men, if the women had the same access to services and if they kept control of income from their work.²⁵

The work of other central units provided further evidence of the detrimental effect of ignoring women. An analysis of participation of rural people in water supply projects throughout Africa, Asia, and Latin America identified beneficiary participation as "the single most important factor contributing to project effectiveness."²⁶ However, the participation of women was less frequent than that of men. It occurred only when specified in project targets, with resources earmarked for it (Narayan, in preparation).

The regions also undertook research and ESW work on cross-sectoral gender issues most relevant to their countries, for example, legal issues and economic adjustment in Africa, enterprise development and financial

BOX 3.5: THE ROLES OF A POLICY PAPER: DEVELOP CONSENSUS, LEGITIMIZE, AND GUIDE ACTION

Policy papers present an organization's official position on a specific topic. They serve as a basis for action by all staff, and inform interested outsiders. World Bank policy papers play several roles, particularly for cross-sectoral topics. First, the decision to issue a policy paper is by itself a recognition that the topic is a legitimate Bank concern, integral to good development planning. Second, to prepare such a paper, staff, managers, and the Board must discuss fundamental concepts and review the evidence. This requires taking stock of experience inside and outside the institution, and reaching some degree of consensus so that strategic decisions and priorities can be agreed upon. For such a process to occur, experience and familiarity with a new concern must first be gained within the institution. In the Bank, the first informal suggestions for a policy paper are found in institutional files in 1975, and

the 1986 work program on WID included preparation of a policy paper within two years in its objectives. A policy paper was issued in 1994.

The Swedish Parliament had established WID as a central concern of its bilateral assistance in 1963. The United States Agency for International Development issued the first comprehensive policy paper on WID in 1982, nine years after a change in legislation made attention to women mandatory in United States bilateral assistance. Similarly, the Development and Assistance Committee of the Organization for Economic Development and Coordination issued WID guidelines in 1983 (and revised them in 1989). The Regional International Development Banks issued formal directives following the 1985 Nairobi conference, as did most bilateral agencies which had not already done so.

services in Asia, labor markets and property rights in ECA, employment in LAC. This choice of topic may reflect a process of learning which is also found when looking at WID assessments over time. Looking at women's roles in a specific situation pushes the researcher to break out of sectoral boundaries, and to broaden the scope of inquiry to cross-sectoral, strategic constraints.

Other development agencies have used a policy paper (or equivalent document), followed by a formal plan of action, to promote

interest in within their organizations. The Bank has waited longer than most other development agencies before issuing a formal policy paper, preferring to concentrate first on building experience and research evidence (see Box 3.5).

In April 1994, the Board approved the policy paper, *Enhancing Women's Participation in Economic Development*. The document provides a solid basis for action. It lays out the rationale for the Bank's involvement in gender issues on the basis of improved efficiency, poverty alleviation, and equity,

confirming the justifications used in various combinations since the 1970s. Noting the cultural sensitivity of gender, the paper emphasizes the role of the borrower in identifying priorities and selecting strategies. It provides an excellent summary of the state of knowledge (based in part on the work initiated by PHRWD) on the payoffs and the barriers in integrating both men and women into the development process. With regard to Bank activities, the paper confirms the policy generally followed since the 1970s:

- *Mainstreaming.* Attention to likely effects of projects on women as well as men should be integrated into all projects as appropriate. Issues that affect women should not be sidelined through women-only projects, except under unusual circumstances.
- *Sectoral focus.* The Bank should concentrate its efforts on “expanding girls’ education, improving women’s health, increasing women’s participation in the labor force, “expanding women’s options in agriculture, providing financial services to women.” (para. 60).
- *Country strategy.* Attention to gender issues in economic and sector work should begin with poverty assessments. Country assistance strategy papers should include plans for dealing with gender issues. Countrywide assessments of the situation of women (widely conducted in the late 1980s) are not mentioned.

To disseminate information and train staff.

Numerous seminars and brown bag lunches on WID, and more recently on gender issues, were organized to disseminate findings from inside and outside the Bank. Announcements for such events are now found in almost all issues of the “Weekly Bulletin.” Various informal networks and working groups continued to facilitate the

exchange of information. In March 1993, a Bankwide gender and poverty network was created by staff to discuss work of common interest, and to bring in outside speakers.

During the late 1980s, in spite of increased demand from the regions and the availability of resources in the Training Department, PHRWD had been reluctant to run a training program before the results of Bank research were available. Between 1988 and 1993, training activities that primarily focused on gender aspects of Bank work would be limited. But attention to gender did become incorporated into training courses on other subjects, especially environment. More recently, the GAP team took steps to improve staff skills through a more comprehensive program well adapted to the needs of the regions (see Box 3.8).

To monitor progress. PHRWD set up a more comprehensive monitoring system than the one established during the reactive period. All projects presented to the Board were reviewed and rated for gender-related actions.²⁷ This database provided quantitative evidence of better project design for the 1990 to 1993 reports to the Board and the Development Committee. But the rating standards were loosely applied for FY88 to FY93, and projects were classified as having some action specifically designed to address gender issues on the basis of very minimal action, such as inclusion of a few female staff in a service agency, or because women were obviously concerned, such as projects in children health or family planning. In spite of this drawback, the database did play a useful role in making gender-related actions (or their absence) more visible to management and the Board. Starting with FY94, a team in ESP is monitoring attention to both poverty and gender through more comprehensive reviews of ESW and project documents.

Operational evolution: sharp increase in gender attention in ESW and investment operations

The proactive stance of senior management and PHRWD in the second half of the 1980s led to a sharp increase in attention to gender in ESW and the portfolio. The changing focus of WID country assessments and the implementation experience for a "new cluster" of investment projects are described below. Of course, most of these projects are not yet completed, so findings remain preliminary. Since overall trends are best seen over both the reactive and the proactive periods, an overview of the portfolio will be given in Chapter 4.

Country-level assessments²⁸

A cornerstone of the proactive years was a systematic program of country-level WID or gender assessments. This was indeed achieved for over fifty countries during the proactive period (see Table 3.1), compared to about 20 during previous years. In addition to their obvious documentation value, some countrywide WID (or gender) assessments helped sharpen discussion between the Bank and borrowers, increased country

ownership of the topic, highlighted the cross-sectoral interaction of gender issues, and raised concerns from the project-specific to the national level. In some countries, the link between a WID or gender assessment and gender-related actions in subsequent projects is clear, but it is as yet too early to trace their effect on project results.

In some countries, the process of preparing WID assessments has helped build greater awareness and ownership among managers. In general, Bank staff or consultants wrote these assessments. Task managers, however, have also noted that borrowers who helped prepare these reports (often in coordination with other agencies in the country's Consultative Group) came to better understand the relevance of gender issues to their development objectives. All reports reviewed in depth (except the Russia report) have emphasized the importance of commitment by the borrower to making women full partners in development, and the very process of assessing a country's past performance in that area helped strengthen commitment.

WID assessments also helped Bank staff from different sectors to understand that gender issues are a cross-sectoral concern with strong cultural

TABLE 3.1: COUNTRY ASSESSMENTS OF WID AND GENDER ACTIVITIES OVER THE REACTIVE AND PROACTIVE PERIODS

Regional office	1976-78	1979-81	1982-84	1985-87	1988-90	1991-93	Total
Africa	1	6	2	1	10	16	36
East Asia and Pacific	0	2	0	1	1	1	5
Middle East and North Africa	0	0	1	0	2	0	3
Latin America and the Caribbean	1	2	1	0	5	2	11
Europe and Central Asia	0	0	0	0	0	4	4
South Asia	0	0	3	2	3	5	13
Total	2	10	7	4	21	28	72

dimensions. Several task managers reported that the exercise had helped them understand the generic nature of such issues as poor delivery of services to women, which they had previously believed to be purely sectoral. They also learned much about gender issues by working with experienced central and regional staff and consultants.

All reports in the assessment cluster cited economic efficiency, equity, and poverty concerns as the reasons to pay attention to gender. All emphasized the social and cultural implications of gender issues, and that local governments were key for sensitizing populations and for promulgating fair laws and regulations. The reports for countries as diverse as Bangladesh, Kenya, Pakistan, Russia and Turkey, for example, discussed the economic consequences of the social constraints on women's mobility.

Over time, the scope of WID assessments became broader. The 1989 guidelines called for "a concise assessment of the Bank's current and proposed approach to support for women's role in development [to] address specifically how the Bank's operational strategy for the country takes into account this topic." Suggested future topics were the economic and social roles of women (including the legal and policy framework of the country) and the situation in priority sectors. The proposed analysis would help establish clear priorities for Bank assistance. Of the eleven reports reviewed in-depth, all covered social, economic, and human resource factors, ten covered legal factors, and nine discussed nonagricultural employment issues, but only seven discussed policy factors.

While early reports were descriptive, over time they have become more analytical. The range of recommendations moved from sectoral recommendations for lifting immediate constraints on women to more general,

countrywide recommendations at the strategic level in a gender framework. For example, the Kenya report addressed low participation of girls at all levels of schooling and lack of access to water and agricultural services. The Turkey report included similar findings on education (especially for vocational, technical, and tertiary training), but discussed these problems in the broader context of labor laws and regulations and the civil code.

Yet even recent reports rarely included detailed plans for implementation. WID strategy papers, recommended as a follow-up, were rarely written. The Gambia report, however, was prepared after the government had requested a WID project. It then served as a key preparatory document for the Gambia Women in Development Project (C2141), one of only three stand-alone projects in the Bank portfolio. Probably because of its unusual timing and focus, this report is the most strategically specific of all those reviewed.

Several countries that stand out for their comprehensive analyses of WID or gender in ESW generally have large gender-related portfolios over time (such as Indonesia and Kenya), or were particularly active throughout the 1970s and 1980s (such as Yemen). The 1987 country economic memorandum (CEM) for Bangladesh included a chapter on WID. A review of the portfolio in ECA and MNA found that the Yemen CEM and one country strategy paper were the only ones for FY88-91 to include a strong discussion of WID issues, and that these documents drew from a series of WID-action projects in education and agriculture and a WID strategy paper.

The process of a WID assessment contributed to borrower commitment. Task managers reported clear links between the WID assessment or country study, changes in the borrower's

commitment to gender issues, and following investments. Task managers linked the Kenya country study, for example, to the FY91 Second Agricultural Extension Project (C2199), which they also saw as a significant outcome of the country review. The project has a major component to ensure that women's groups have access to extension services. In Turkey, findings from the WID assessment report and subsequent conference were discussed and follow-up activities planned during a one-week conference. Given high visibility, this conference was itself a significant event for the country. Subsequently, the borrower prepared a National Day Care Center Project and an action plan for the development of women-run enterprises.

In Bangladesh and in Pakistan, the WID assessments were further discussed at formal meetings with aid agencies and the borrowers. In both countries, inclusion of gender issues on the agenda of these high level meetings gave visibility and legitimacy to the topic, and led to follow up action by borrower senior officials. In Bangladesh, the green cover document was discussed during the 1990 Local Consultative Group Meeting, in which the Bank's president participated. The Planning Commission established working groups to coordinate actions promoting attention to women in the sector chapters of the Fourth Five-Year Plan for 1990-95. Bank staff report that the sectoral reviews included in the WID assessment continue to influence the project pipeline in areas as diverse as fisheries and sericulture, as well as education, health, and population.

Also in 1990, the Pakistan WID assessment was discussed at the Consortium of Donor Agencies and during the Bank's country implementation review. Borrower officials and Bank staff continued to discuss gender issues in relation to sectoral projects in agriculture and human resources. The impor-

tance of educating girls was highlighted during the 1992 Bank annual meetings held in that country. The borrower's increased commitment to addressing gender issues was reflected in national and in Bank-funded projects, including the social action program approved in March 1994.

Recent poverty assessments, for example, for Uganda, the Central African Republic, and Mali, described and discussed the gender-dimensions of poverty using an innovative blend of qualitative information and statistical data. Participatory techniques for data collection helped identify what it means to be poor from the point of view of the people themselves, including women.²⁹ Poverty assessments, however, do not come close to country assessments targeted specifically for gender issues in their scope and depth on these subjects.

Increase in number and diversity of projects with planned gender-related action

For FY86-93, 24 percent of the projects approved by the Bank included some form of gender-related action, up from 7 percent of projects approved during the reactive years.³⁰ Projects with gender-related action nearly doubled from FY88 to FY89, two years after WID became an area of special emphasis. These projects peaked in FY91 and remained steady at 36 percent in FY92 and 35 percent in 1993. Projects with gender-related action continued to be concentrated in low-income countries, with the increase particularly strong and steady in the Africa region (see Figures 3.1 and 3.2).

Human resources and agriculture—the two areas of concentration cited in all policy documents since the 1970s—remained the sectors most active in gender issues (see Figures 3.3 and 3.4). Yet projects with gender-related action have maintained a level above 50 per-

FIGURE 3.1: INVESTMENT PROJECTS WITH GENDER-RELATED ACTION, ACROSS REGION, FY86-93

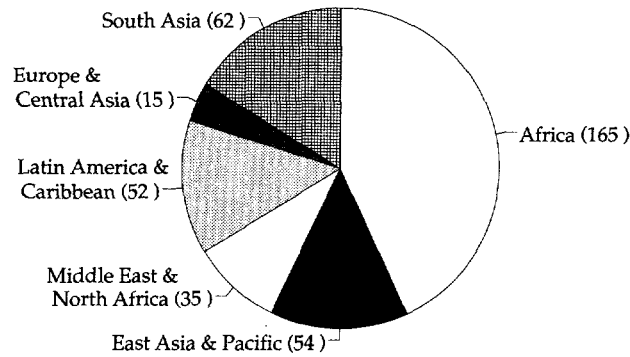


FIGURE 3.2: INVESTMENT PROJECTS WITH GENDER-RELATED ACTION, ACROSS INCOME GROUP, BY APPROVAL YEAR, FY86-93

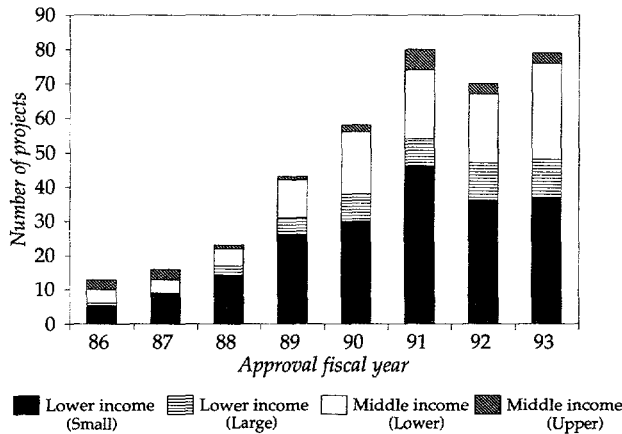
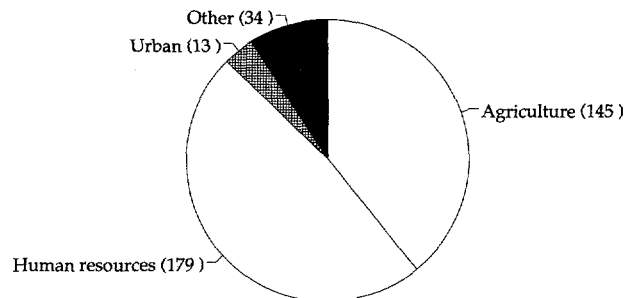


FIGURE 3.3: INVESTMENT PROJECTS WITH GENDER-RELATED ACTION, ACROSS SECTOR, FY86-93



cent only since FY89 for human resources, and since FY91 for agriculture (see Annex 2).

Few projects approved during the proactive period have yet received a PCR or audit rating. The regions' Annual Report on Portfolio Performance will be discussed with the overall review of the FY67-93 portfolio (see Chapter 4).

The new cluster of projects

As with the reactive period, a detailed review of implementation experience was done on a cluster of projects with gender-related action approved in FY87-88 and expected to be completed by June 1994 (see Annex 1). Twenty-four projects met these criteria (see Annex Table 2.9). They were concentrated in Africa (14 projects). With the exception of one urban project, the projects were about equally distributed between the agriculture (11 projects) and human resources (12 projects) sectors.

PCR ratings were not yet available for the "new cluster." The five draft PCRs available for the new cluster continued to give little attention to gender-related actions, as did PCRs for the old cluster. Even when a good evaluation identified a differential impact of project activities on men and women, the PCR discussed the findings but did not include them in its lessons section, nor did the PCR discuss how the evaluation findings would influence the design of the follow-up loan (see Box 3.6).

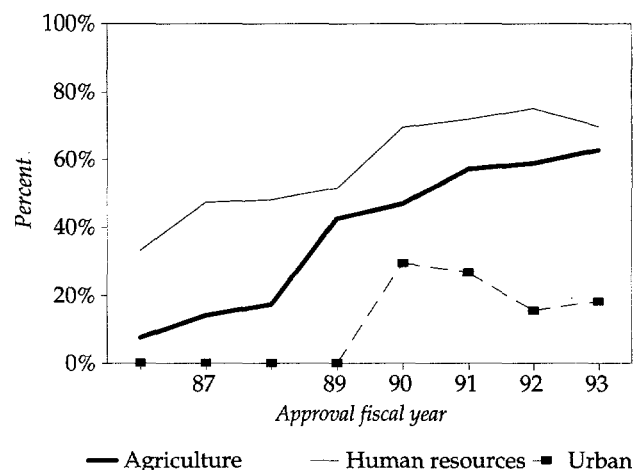
The objectives and implementation experience of the new cluster is best discussed in comparison with the old cluster. In both clusters,³¹ a well-defined gender-related action was more likely to be satisfactorily implemented and sustainable if three factors were present: country commitment to the project and to the gender action, involve-

ment of a WID specialist, and good supervision of the gender component. Country commitment to gender issues was always associated with satisfactory implementation of the gender action, and with one exception, with good supervision of the gender action. Three projects with poor country commitment, however, did have good attention to gender during supervision and their gender action was satisfactorily implemented. The usefulness of supervision is shown in the Somalia Second Agricultural Extension Project (C1794), which provided training for farmers. The first supervision mission stressed that, since women did mostly farm work, they should be given extension advice, in a culturally acceptable way. Subsequent supervisions monitored progress and offered consistent help and support. This was done by: (a) increasing the number of women contact farmers, when possible, and (b) introducing more efficient implements for women's tasks.

Supervision of the gender component has been improving but is not yet systematic; good supervision is more likely if gender objectives are formally included in project objectives. Supervision of gender-related actions ranged from no mention in files to comprehensive discussions in Aide-Memoires and Form 590s.³² Supervision was reasonably satisfactory for 58 percent of the "new cluster," a strong improvement over the 31 percent of the "old cluster." Projects for which gender-related actions were clearly specified, especially if they were included in project objectives or listed in the Form 590 summary of objectives (China, Ethiopia, Malawi, both Yemen projects), were more likely to receive attention to gender issues during supervision (70 percent in "new cluster," 50 percent in "old cluster").

Good supervision and a satisfactory implementation process are linked. For the two clusters

FIGURE 3.4: PROPORTION OF PROJECTS WITH GENDER-RELATED ACTION, FOR SELECTED SECTORS, BY APPROVAL YEAR, FY86-93



together, 93 percent of the projects with very good supervision of gender actions were found to have implemented their gender-related actions satisfactorily. If one combines all projects for which attention to gender during supervision was good or at least moderate, 20 of 25 projects are making satisfactory progress in implementation, three are making some progress, and the evidence for the last two is uncertain. On the other hand, only 11 percent of the projects with attention to gender during supervision showed evidence of implementation success.

Involvement of a gender specialist³³ increased the likelihood of good supervision of the gender-related action. A gender specialist was involved in a total of seven projects for the two clusters. Involvement occurred during supervision in all project except one in Pakistan. A gender specialist was also involved during appraisal for projects in Pakistan and Yemen, and during implementation (local staff) in Ethiopia, India, and Uganda. All of these projects were found to have good supervision of gender-related action, but six other projects in which no specialized staff

BOX 3.6: MEXICO—MANPOWER TRAINING PROJECT (L2876)

The project goal was a complement to the Bank's assistance for economic restructuring and policy reforms. It aimed to reduce human resource constraints to growth, increase productivity of labor and lessen the social impact of adjustment through: (a) strengthening of state employment services; (b) implementing a retraining program for 160,000 displaced and unemployed workers; (c) strengthening the Ministry of Labor and Social Welfare to guide the effective development of training; and (d) increasing and better distributing its training capacity. The project did not specifically address women, but the unemployed subgroup targeted for retraining included women re-entering the work-force. No distinction was made between the training of men and women. A detailed evaluation analysis of the training program assessed the impact of the program on females and males separately. The impact for male trainees with work experience was positive, but mixed for female trainees. As of December 1992 the percentage of trainees finding jobs within three months was 60 percent for men and 30 per-

cent for women. Average duration of unemployment was reduced by 2.5 months for males and by 1.9 months for females; male trainees were more likely to find employment in large firms than comparable control groups, but for females no similar effect was found; and the monthly earnings of male trainees increased. For women, there is some evidence of positive effect on hours worked, but not on monthly earnings.

The project shows that equal treatment for men and women does not necessarily translate into similar impact. Whether gender-related actions are specified or not, staff need to be gender sensitive during implementation, supervision, and monitoring and evaluation, and the effects on men and women should be discussed in the PCR. The PCR for the Mexico training project cites the differences in effects on men and women, and states that they will be investigated further in the Labor Market and Productivity Enhancement Project (L3542). But these findings are not included in its lessons learned.

seemed involved (although the information is incomplete) also had good supervision. Interviewed staff reported that involvement of a specialist during appraisal or supervision, or during a previous WID assessment field mission, had been useful in sensitizing and 'training' Bank task managers. Some task managers who had been oblivious of gender issues were observed to address the topic better in subsequent projects, after having worked during one mission with a good specialist.

Gender-related actions included some form of participation by local people, at least during implementation, in 79 percent of the "new cluster" projects and 53 percent of the "old cluster." Participation was expected to occur mostly through local NGOs, farmers' associations, parents' associations, or women's groups. For example, the extension and training sub-component of the Uganda Southwest Region Agricultural Rehabilitation Project (C1569) called for home eco-

nomics staff to work with women farmers. The training activities were successfully implemented only after working through 343 existing women groups in the area. For both clusters, projects with some participation seemed more likely to implement their gender-related action (62 percent vs. 45 percent), but sustainability was low. The information available through the files, supervision reports and existing PCRs was insufficient to better document this preliminary evidence.

Overall, the objectives of the gender-related actions in the "new cluster" were broader than those of the earlier cluster. The old cluster projects focused mostly on improving access to basic services (education, maternal and childcare, family planning, nutrition) and increasing employment opportunities mostly in health and education. These strategies remain present in the new cluster, but the focus in agriculture shifted from secondary to primary sources of income.

Agriculture projects in the "old cluster" supported the formation of women's groups, and trained them about nutrition, home economics, and handicrafts. In the new cluster, agriculture projects opened regular agricultural extension advice or agricultural credit to women. Some included skills training for entrepreneurs. For example, extension services under the Bolivia Ulla Ulla Project (C0762, approved FY79) provided women with information on home economics topics, ignoring women's important responsibilities in llama herding and in bookkeeping for household businesses. In Cameroon, the Zapi Integrated Development Project (C0776, approved FY78) trained women as midwives, but did not check whether women farmers had access to agricultural extension. By FY87, agriculture projects provided women with advice on farming tasks and various income-generating micro-projects.

For example, the Ethiopia Small-Scale Irrigation Project (C1765, approved FY87) included funding, on a pilot basis, for 370 vegetable gardens and a line of credit for female-headed micro-enterprises. In the Yemen Southern Regional Agricultural Development Project (C1772, approved FY87), the Bank and International Fund for Agricultural Development staff strongly encouraged the agricultural extension service to reach women farmers. Also, efforts to help women gain access to private sector employment were more frequent (Benin, Bolivia, Ethiopia, India), but policy changes were still rare (with the exception of Pakistan).

Current approaches in the portfolio

Some innovative strategies are being tested in projects approved too recently to be evaluated or still under preparation. New approaches are found in sectors, like education, with a long tradition of attention to gender issues. But efforts to integrate women into project design are also found in new areas such as micro-enterprises, natural resources management, water and sanitation, and finance projects (see Box 3.7 for a few examples). Attention to gender in other sectors increased slowly, in spite of the increased evidence that decisions in infrastructure, industry regulations, and urban services affect labor opportunities for men and women differently.³⁴

For the first time in Bank history, three stand-alone projects for women were approved during the proactive period, two in AFR (L3251 in Côte d'Ivoire, approved FY91, and C2141 in Gambia, approved FY90) and one in LAC (L3101 in Mexico, approved FY89). The first was a small-scale pilot project, which has just been completed. The second seems successful in integrating gender issues in a concurrent agricultural

BOX 3.7: EXAMPLES OF CURRENT APPROACHES TO GENDER ISSUES IN ESW AND INVESTMENT PROJECTS

To keep girls in schools:

- To encourage girls in grades 6-10 to finish school and become better prepared for employment, the Bangladesh Female Secondary School Project (C2469, FY93) uses a package of incentives aimed at girls, their parents and community, and their teachers. This includes a stipend, deposited in a bank account that each girl opens in her own name, a public awareness program, a program to support salaries of additional teachers, and a water supply and sanitation program.
- The Morocco Rural Basic Education Development Project (L3295, FY91) supports building smaller middle schools, closer to the communities they serve, and providing amenities attractive to parents and pupils, and housing for teachers. The project will also conduct household surveys to determine parents' expectations of female education.

To provide female entrepreneurs and farmers with skills, resources, and services:

- In the Gambia, the Women in Development Project (C2141, FY90) addresses constraints that women face across sectors, but at the same time coordinates with sectoral projects to address practical constraints through regular line agencies and projects. For example, extension advice tailored to women's activities is being developed and provided by the extension agency with funding from the Agricultural Services Project (C2453).
- In Morocco, the National Agricultural Credit Project (L3088, FY89) helps the National Agricultural Credit Bank become more client-oriented: advertising campaigns, mobile vans with trained female agents, flexible procedures, and lower down-payments make it easier for artisans, especially women, to become clients.

services project but will not be completed until FY97. The third was canceled. An OED cluster audit, following completion of the Gambia project, would help determine whether and how WID projects may have a role in Bank lending.

The central GAP team and the regions are undertaking a number of innovative activities to strengthen staff skills and promote

attention to gender issues in ESW and operations. These steps, too recent to be evaluated, are described in Box 3.8.

While not aimed at gender issues, several recent developments in the Bank should help mainstream gender concerns. In its forthcoming report, *The World Bank and Participation* (draft June 10, 1994), the Learning Group on Participatory Develop-

(Box 3.7 continued)

- In Pakistan, follow up on a micro-enterprises project will involve NGOs in providing support to women micro-entrepreneurs (in preparation).

To promote community involvement in rural and urban natural resources management:

- The Egypt Matruh Resource Management Project (C2504, FY93) was prepared through a participatory process with the communities concerned. Care was taken to obtain the views of women separately, to ensure that rural services are tailored to users needs. A similar process is contributing to the preparation of the Philippines Natural Resources Management Project.
- Women, who traditionally are responsible for water, waste disposal, and health maintenance in their households, were actively involved in identifying priorities and mechanisms to improve an older neighborhood in Lome under a Togo Urban Project (in preparation).

To address gender issues in poorer households:

- In Zambia, a participatory WID assessment, community surveys, and research on intra-household decisions in urban areas are all contributing to the preparation of a Poverty Assessment. There is complementarity between work focusing on gender, on communities, on households and on poorer segments of the population.
- Multipurpose cyclone shelters are being built in Bangladesh as community centers used year-around, to ensure that women become familiar enough with the centers to take refuge there in an emergency.
- Several Social Funds projects are making special efforts to encourage requests particularly useful to women, for example Bolivia Social Investment Fund II (C2532, FY93) and Egypt Social Fund, C8494, FY91).

ment recommends that the Bank support an enabling environment for participatory development within client countries, and improve the quality and breadth of participation in the Bank's own practices. This would be done by, among other things, ensuring that all projects identify and seek the participation of relevant stakeholders throughout the project. When the roles of some women may be affected differently

from those of men by an intervention, then these women form a separate category of stakeholders and their views should be obtained separately. Guidelines on gender issues and participation are being developed.

Guidelines on "Social Assessments—Incorporating Participation and Social Analysis into the Bank's Operational Work" are

BOX 3.8: EXAMPLES OF CURRENT ACTIVITIES TO INCREASE STAFF ATTENTION TO GENDER ISSUES

To improve staff skills:

The program of the Gender Analysis and Policy team to support mainstreaming of gender issues in operations includes several innovative features:

- Training for Bank staff tailored to operational needs at the regional level, starting with MNA and ECA.
- 'Best practices tool kits' providing task managers with a range of tools (key research findings, examples of strategies and Bank interventions, and lessons learned) on selected topics.
- Support to the regions to demonstrate, in selected countries, how gender concerns

can be mainstreamed throughout preparation of country assistance strategies and operations.

To address gender issues in economies in transition:

ESW in ECA found that women in economies in transition are at a higher risk of losing their jobs, and that a number of social and economic factors make it difficult for them to be hired. These findings have implications for projects in the social and productive sectors, and they need to be understood at the national level. The special Fund to Support WID work provides seed financing for new areas of inquiry. Proposals approved so far include: Women in the Labor Market in the former Soviet Union; Changing Patterns of Childcare and Repro-

being finalized (May 1994 draft). They describe the process through which the social factors that affect development impacts and results are identified during ESW and project design. Such a social assessment includes identifying and understanding relevant differences in gender roles and status. Participatory development and social assessments both help make gender differences more visible, and therefore more difficult to ignore.

The Economic Development Institute plans to hold multi-year learning programs which engage Bank staff as well as borrowers in a

dialogue on cross-sectoral themes. This could help Bank and borrower staff discuss gender and develop a common understanding of these issues in specific settings.

Notes

1. *World Conference to Review and Appraise the Achievements of the United Nations Decade for Women: Equality, Development, and Peace*, September 1985, Nairobi, p. 6.
2. Percentages reported in the Progress Reports and in this study differ slightly because PHRWD included all lending in their calculations, while this study focuses on investment lending. A few errors in the PHRWD database at the time (mostly projects listed twice), furthermore, have since been corrected.

(Box 3.8 continued)

ductive Health in Eastern Europe; and Gender and Property Rights in Transitional Economies: A Focus on Women and Agrarian Reform.

To improve attention to gender issues during preparation and appraisal:

In the Asia, Africa and Europe, Middle East and North Africa regions, staff initiated systematic reviews of initial executive project summaries to identify projects for which gender expertise would be most useful. In Asia, the review includes a rating system based on the potential for gender-related action and the apparent need for technical support and advice from gender specialists. Projects with good potential (or serious risks) and in need of support are monitored throughout preparation. Guidance and technical inputs are offered as needed.

To improve attention to gender issues during supervision:

Several country departments have found thematic supervision of gender issues useful. A gender specialist visits a group of projects in a country to assess implementation progress. This provides expert attention to aspects which routine supervision may overlook, and helps identify common institutional or other constraints which affects these projects. Thematic supervisions of agriculture projects were found to be a useful learning process for both borrower and bank staff in Nigeria and Yemen.

A cross-sectoral gender implementation review in Yemen, planned for FY95, is expected to highlight gender issues in each project and identify common issues within and across sectors. MNA plans to undertake such reviews periodically.

3. Minutes of the December 12, 1989 and January 17, 1990, vice president, Policy, Research and External Affairs Department, peer review meetings.
4. Memorandum to members of the President's Council, "Report to the Executive Directors on Women in Development," February 9, 1990, p. 2.
5. Memorandum from the president to the senior vice presidents, "Re: Women in Development," February 16, 1990.
6. The FY86 allocation for WID was \$80,000; by April 1986, it had been increased to \$190,500, with prospects of similar Bank funding for the following year. By FY88, PHRWD had an estimated budget of \$620,000 (\$280,000 in Bank funds and \$340,000 from outside funds). The budget would continue to increase to some \$2 million in FY90 and \$2.5 million in FY92, including \$1.1 million in Bank funds. Several countries (especially the nordic countries, pioneers in addressing gender issues in their own assistance programs) were keen to assist.

7. During the Bank's internal reorganization in 1987, the WID advisor convened a steering group of staff and managers. Regional information exchanges were then most developed in Eastern and Southern Africa (ESA)—a region headed by a vice president supportive of women's issues—where work on the new program was concentrated. The ESA Task Force became regionwide, under technical department leadership after the 1987 reorganization.
8. This remained the only guidance cited in the Operational Manual prior to the 1994 OP 4.20 on gender.
9. Letter from senior vice president for Operations to regional vice presidents and directors, April, 26, 1990. The senior vice president noted that some departments had already designated such persons, who devoted up to 50 percent of their time to WID work.
10. ESP estimates that about half of its higher level and long-term consultants are expected to contribute to the gender workprogram in FY95.

11. As listed in the Asia WID Team Work Plan, 1992–95 (April 1992) and in the Africa FY94–96 Business Plan, cited in *Making the GRADE: Transforming the Development Agenda in the Africa Region* (September 1993).
12. Asia WID Team Work Plan, 1992–95, op. cit., para. 27.
13. The first WID advisor had played a similar role for selected sectors, using the review role then common to all central advisors.
14. In human resources, they include water and sanitation, and disease control in Asia, education and health in Africa. In the productive sectors, agriculture and private sector development (specifically finance and micro-enterprise in Asia) are common to both regions, plus infrastructure in Africa and resettlement in Asia.
15. The Living Standards Measurement study and the Social Dimensions of Adjustment surveys were two programs funded in part by the Bank.
16. September 30, 1993.
17. Memorandum from PHRWD to Africa Technical Department, Agriculture Division (AFTAG), March 22, 1989.
18. Communication from Africa region staff to PHRWD, November 7, 1988. The Africa region took the initiative to prepare a guide for agricultural staff (“Women in Agriculture in Africa: A Guide to Bank Policies and Programs for Operations Staff,” December 1989).
19. Molnar, 1989.
20. Saito and Weidemann, 1990; Saito, Spurling, and Zipp, 1991.
21. Back-to-office report from the WID advisor to the director of Projects Policy Department, June 9, 1986.
22. This effort was supported in part by a trust fund from the Norwegian government and other trust funds.
23. Policy Planning and Research (Operations Policy staff before 1987) Working Paper No. 269, *Women in Development: Issues for Economic and Sector Analysis*, August 1989.
24. See Subbarao and Randy, 1993, and Summers, 1992. The 1977 OMS on population already stated that the evidence available at the time was sufficient to warrant Bank support for the education of girls, but thorough Bank research had not been available.
25. Saito and Menekken, 1994.
26. Narayan, 1993.
27. The rating system used for FY88–93 is described in Annex 1.
28. This section is based both on WID (or gender-specific) reports and more general reports and interviews for selected countries. (Kenya 1989, Gambia 1990, Pakistan 1989, Bangladesh 1990, regional LAC study 1991, India 1991, Indonesia 1992, Nigeria 1992, Russia 1993, Turkey 1993 and Zambia 1993). Country studies were selected for regional representation and time spread, with priority given to published reports.
29. A series of participatory poverty assessments is under way in Africa. One would expect them to include good attention to gender issues, but it is too early to tell.
30. Percentages reported in the progress reports and in this study differ slightly because PHRWD included all lending in their calculations, while this study focuses on investment lending. A few errors in the PHRWD database at the time (mostly projects listed twice), furthermore, have since been corrected.
31. Project files for the new cluster provided preliminary evidence of results for these projects under implementation.
32. The WID rating added to Form 590 in the Asia region is discussed with the overall portfolio performance in Chapter 4.
33. The term gender specialist is used for staff or consultants experienced in analyzing and promoting gender issues and who are brought in a team for that purpose. Such individuals can have quite diverse disciplines and sectoral backgrounds.
34. See Buvinic, 1993 and Blackden and Morris-Hughes, 1993.

4. Overall portfolio evaluation, FY67-93

The evolution of the portfolio with gender-related action and a detailed review of selected project clusters were discussed separately for the reactive years (see Chapter 2) and the proactive years (see Chapter 3). This chapter describes the distribution, funding, and performance of the 615 projects with gender-related action over the entire study period (the tables in Annex 2 provide supporting data).

Distribution of projects with gender-related action

At least 615 out of more than 4,955 investment projects approved between FY67 and FY93 included some type of gender-related action. The distribution of these 615 projects over time (see Figure 1.1) shows that a first increase during FY78 and FY84 was not sustained. A second, much greater, increase started around FY88, and the proportion of projects with gender-related action has remained stable since FY91. These figures include projects with minimal action as well as projects with more elaborate steps to take gender differences into account. Changes of a few percent from one year to the next are meaningless, but the increase that started in FY88-89 is too large to occur by chance. Most projects approved during this increase are still under imple-

mentation, and only 196 of the 615 projects have been evaluated.

Overall, AFR had the largest number of these projects (41 percent of total), followed by South Asia and LAC (15 percent each), East Asia and the Pacific, MNA, and ECA (see Annex Tables 2.1 and 2.2). For all regions except MNA, half or more of the projects with gender-related action were approved between FY89 and FY93. This could not be achieved through the work of only a few 'convinced' task managers, but shows that Bank staff and managers generally are now more aware of the importance of the issues—or the importance of addressing them to get projects approved.

Human resource projects (including education and health, population, and nutrition) were the most numerous, with a total of 284 projects, or 46 percent of the 615 projects (see Annex Tables 2.3, 2.4, and 2.5). This is not surprising, since PHN and, to a lesser degree, education projects are by their nature likely to include some activities directly targeted at women and rated as "gender-related action" by PHRWD.

Agriculture was the second largest sector, with 238 projects (39 percent of 615 projects). Like human resources, agriculture has been an area of concentration for WID and then

FIGURE 4.1: LOANS AND CREDITS WITH GENDER-RELATED ACTION, BY REGION, FY67-93



gender efforts since 1975. Yet the percentage of projects with gender-related action out of all projects approved each year in that sector did not exceed 40 percent until FY89. Area development projects accounted for 37 percent of the agriculture projects with gender-related action, and their prevalence was highest during the reactive period (see Annex Table 2.5).

The 38 urban projects with gender-related action represented 18 percent of the sector, but unlike other sectors, they peaked during the reactive years (FY78). The diversity of sectors with some attention to gender increased in the last few years.

Individual country studies could not be conducted in this overview, and most of the comprehensive countrywide gender assessments were conducted in recent years. It is therefore not possible in this report to identify why some countries have relatively more projects with attention to gender, or to discern patterns in interaction between ESW and projects results.

Funding

Of the 615 projects with gender-related action, more than two-thirds (410 projects) were funded through the International Development Association (IDA).¹ This was expected, since the majority of the 615 projects were found in low-income countries (393 projects) or lower middle-income countries (196 projects) (see Annex Table 2.6). The proportion of IDA funds remained at about 66 percent of approved investment projects for both FY67-85 and FY86-93. It fell below 60 percent only for FY76-78, FY80-82, and FY86. The regional distribution of IDA credits with gender-related action corresponded to the distribution of the general portfolio: the majority of IDA credits were found in the Africa (218 projects) and South Asia (92 projects) regions (see Figure 4.1).

The sectoral distribution is also similar. The largest number of IDA-linked projects with gender-related action were found in human resources (187 projects with IDA funding out of 290) and agriculture (162 projects with IDA funding out of 251), the sectors with most gender-related action for both credits and loans, followed by urban (19 projects with IDA funding out of 41) (see Table 4.1). Among other sectors, all with fewer than 15 projects with gender-related action for the entire period, the proportion with IDA credits is above 60 percent. For example, all six transport projects with gender-related action had IDA funding, as did 11 out of 15 finance and 8 out of 13 water and sanitation projects with gender-related action. This shows that the link between attention to gender and attention to poverty issues holds in sectors that are less traditionally associated with women's concerns.

Overall commitment for all 615 projects with gender-related action totaled \$31,814 million equivalent, out of \$350,216 million commit-

TABLE 4.1: LOANS AND CREDITS WITH GENDER-RELATED ACTION, BY SECTOR FY67-93

<i>OED Sector</i>	<i>Credits</i>	<i>Loans</i>
Agriculture	162	89
Energy	3	0
Finance	11	4
Human resources	187	103
Industry	3	3
Nonsector specific	7	1
Power	3	1
Telecommunications	1	0
Transport	6	0
Urban	19	22
Water and Sanitation	8	5
Total	410	228

ted for all investment projects during FY67-93 (constant 1993 dollars). The 615 projects therefore averaged 9.1 percent of total commitment over the period, and 20 percent of all IDA funds committed. These proportions did increase in recent years. Projects with gender-related action represented 29 percent of total commitments for FY91 and FY92, and 21 percent for FY93. For IDA funding only, the percentages were 60, 59, and 47 respectively.

The data presented in the previous paragraph can be put in perspective by comparing it with commitment amounts in human resource sectors during the same period. Between FY67 and FY93, a total of \$21,758 million equivalent (constant 1993 dollars) was committed for 469 education projects, and \$8,025 million for 170 population, health, and nutrition projects. The proportion of human resource development sectors within the total investment portfolio increased in recent years, as did projects with gender-related action.

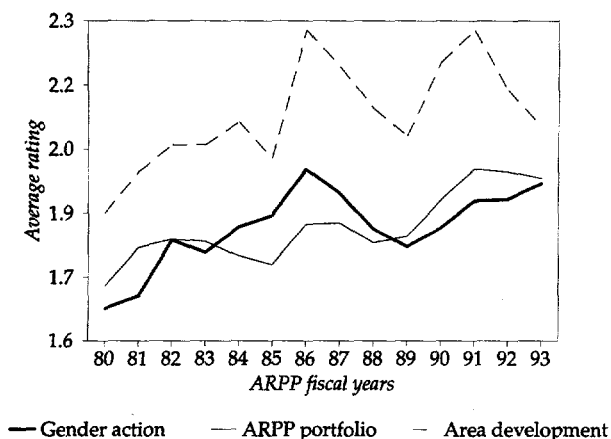
Of course, gender-related activities received only part of the total credit or loan amount committed for each project. Estimating the

amount specifically earmarked for gender-related activities would be difficult. These activities did not necessarily coincide with separate project components; many other activities provided benefits to both men and women, and some (such as institutional strengthening) cannot be linked specifically to individual benefits. It was not feasible in this overview to break down project costs directly earmarked for gender-related action.

One possible source for a very rough approximation of the level of efforts intended to support gender-related action, short of a detailed analysis of all project costs, seems to be the program objective categories (POC).² Since FY91 (and retroactively for some projects back to FY78), task managers can assign up to five program objective categories or subcategories to identify "(Bank) Program Objectives that will be impacted by this project. . ."³ The reliability of the POCs has been questioned, and they are at best rough estimates. Nevertheless, since FY91 the Annual Report on Portfolio Performance has used the primary POC to estimate commitments by program objectives, simply assuming that all funds committed to that project support the primary program objective code. A search of the MIS database identified only 11 projects with WID as their primary objective, obviously well below the number of projects with gender-related action. But 285 projects were given WID as a nonprimary objective.⁴

To assume that all committed funds for a project with WID among its POC support the WID program objective would be against the intent of the task manager, since he or she chose not to have WID as primary objective. The review of selected projects for this study had also shown that gender-related actions are only part, and often a small part, of project objectives. But for each

FIGURE 4.2: AVERAGE OVERALL ANNUAL REPORT ON PORTFOLIO PERFORMANCE RATINGS



POC, task managers also project the percentage of staffing input that will contribute to the achievement of the objective; since each input can contribute to several objectives together, the total percentage can be greater than 100.⁵ Staff input is not a direct measure of contribution to objectives, but it is reasonable to assume that there is some relation between the time a task manager expects to devote to a project activity, and the contribution of that activity to project objectives.

For the 285 projects with WID as a non-primary program objective category, task managers allocated an average of 34 percent for WID. If the same percentage applied to the 615 projects with known gender-related action, the total commitment contributing to the WID program objective would be some \$10,817 million. For those projects approved in FY93, the total commitment contributing to the WID program objective would be around \$1,374 million, or about 7 percent of the total commitment for all investment projects approved that year. This is only a rough indication of the magnitude of attention to gender issues, and not a measure of planned

project costs or commitments. But it shows that gender-related actions represent a small proportion of investment lending.

Project performance

On average, differences in overall performance between projects with and without gender-related actions were small. The implementation ratings given by Operations averaged 1.87 with and 1.85 without gender-related actions (see Annex Table 2.8). OED gave a satisfactory rating for overall achievement of objectives to about 70 percent of projects with gender-related action already evaluated (therefore approved during the reactive period). This is comparable to the 73 percent satisfactory rating for all projects approved during the same period. Over time, the PCR, PAR, and the Annual Report on Portfolio Performance ratings both evolve in a similar fashion. In Annual Reports on Portfolio Performance, the performance of projects with gender-related action was slightly better than that of other projects in FY80-83, slightly worse in FY84-88, and again slightly better in 1989-93 (see Figure 4.2 and Annex Table 2.5).

The high number of area development projects among projects with gender-related action (see Figure 2.5) contributes to the pattern observed in Figure 4.2. Area development projects had consistently poorer (higher) Annual Report on Portfolio Performance ratings than average, more than 13 percent worse (higher) per Annual Report on Portfolio Performance fiscal year between FY80-93. Area development projects always represented a large proportion of agriculture projects with gender-related action, reaching over 80 percent every year between FY81 to FY84. Projects approved between FY81-84 would have been under implementation, and therefore subject to

Annual Report on Portfolio Performance rating, during the years FY84-88, when their poor performance would lower the Annual Report on Portfolio Performance rating of projects with gender-related action between FY84-88. The increasing percentage of projects in the Africa region would also have contributed to poorer overall performance for projects with gender-related action.⁶

It is too soon to know the rating of gender-related projects initiated after FY86, since most have not yet been evaluated for performance. Projects under implementation during the period FY84-88 with an Annual Report on Portfolio Performance rating worse than that of the portfolio were approved in the early 1980s, when the number of WID projects was small. Only when the large influx of projects approved since FY88 comes up for performance review will it be possible to form conclusions about the efficacy of recent Bank efforts to address gender-related issues. To date, no difference in performance between gender-action projects and the role of the portfolio can be confirmed.

WID supervision ratings (Form 590)

The supervision Form 590 requires task managers to rate their projects on a broad

range of indicators. Starting in FY91, the two Asia regions added a WID rating to the Form 590 for all projects, regardless of gender objectives. One could expect that projects with explicit gender-related activity would be more likely to receive a good WID supervision rating, since they would include many of the factors associated with good performance in the cluster reviews: gender analysis during preparation, clear targets, and sufficient implementation plans. Supervision teams should find it difficult to ignore the issue in such circumstances, and the presence of a WID rating on the Form 590 should be a further reminder.

At the time of writing, WID supervision ratings were available for 212 projects, of which 87 included some gender-related action at approval. (For WID supervision ratings for projects with and without gender-related action, see Table 4.2.) After constructing an average rating for each project covered based on a maximum of four observations, it appeared that the average ratings for the group with gender-related action (1.42) and those without (1.36) were similar.

This result should be interpreted with care, since these ratings are given subjectively. Supervision teams may have been more

TABLE 4.2: WID SUPERVISION RATINGS FOR ASIA REGION PROJECTS WITH AND WITHOUT GENDER-RELATED ACTION, BY FY, IN PERCENTAGES

	Ratings ^a	FY91	FY92	FY93	FY94
Projects with gender-action	1	75	63	60	65
	2	13	30	37	32
	3	13	7	3	3
Projects without gender-action	1	64	69	75	75
	2	26	30	24	24
	3	9	1	1	2

a. 1 = no significant problems; 2 = moderate problems; 3 = major problems. No project was rated 4 (major problems, but problems are not being adequately addressed).

demanding for projects with precise gender targets—for example, they may have given a poorer WID rating when these targets were not being met, while supervision teams for projects with no such targets or specific action just assumed that, as long as project implementation overall was proceeding well, the impact on WID was likely to be achieved. Indeed, when looking at yearly variations, projects without gender-related action were slightly more likely to have a good WID rating. The Asia gender and poverty team has not found the Form 590 WID rating to make a difference in level and quality of attention to gender issues during supervision. Some teams simply used “not applicable” for WID impact on the Form 590 when the project had no specific WID objectives. This shows how staff can be oblivious to the impact on women if it was not foreseen in project objectives.

Notes

1. This includes 387 projects funded exclusively by IDA credits and 23 ‘blend’ projects with both IDA and International Bank for Reconstruction and Development (IBRD) funding. IDA funding accounted for 70 percent of total commitment for the 23 ‘blend’ projects.
2. Adjustment and debt, poverty reduction, human resource development, privatization and public sector reform, financial intermediation, environment, natural resources, basic infrastructure and urban development, and economic management. The categories are currently being revised to include only five headings: economic management, environmentally sustainable development, poverty reduction and human resource development, private sector development, and women in development. Data on the revised headings came out too late to be used in this report.
3. Planning and Budgeting Department, Country Assistance Management Handbook, April 1994.
4. These do not entirely overlap with the 615 projects with gender-related action.
5. Except in the Africa region, where they must total 100.
6. OED, 1992 *Evaluation Results*.

5. Findings, suggestions, and recommendations

Findings

Throughout the 1970s and early 1980s, the efforts of some staff members and the demands of international UN conferences during the International Decade for Women led the Bank to recognize the relevance of gender issues, establish a WID advisor position, and discuss—albeit marginally—the role of women in Bank statements, reports, and guidelines. Bank staff and consultants experienced in gender issues provided staff in operations with technical support, case studies, and training seminars.

As a result of these actions, some basic principles that continue to underline current policy were identified early—the 1979 *'Invisible' Woman* document noted that “women make up a disproportionate number of the poor . . .” and that “economic change (had) widen(ed) the productivity gap between their labor and that of men.” It warned “if women continue to be left out of the mainstream of development . . . serious inefficiencies in the use of resources will persist” (page 1). The Bank recognized the importance of allowing member countries to have autonomy on culturally sensitive issues and the desirability of focusing on sectors with the greatest payoffs (starting with human resource development and agriculture). The mainstreaming of gender issues through regular lending

was deemed preferable to WID-only projects.

But resources for putting these principles into action remained sparse and management support uneven. The case studies did not convince all who read them. Training seminars, which opened a new approach to gender analysis, had only limited effect on Bank staff. In FY78-83, attention to gender issues in sector work and operations did increase, only to decrease again for a few years. Upon detailed review, projects cited in the *'Invisible' Woman* as examples of gender-related action were found to have limited gender objectives. Those projects that did plan for gender-related action encountered implementation difficulties, and suffered from insufficient supervision attention to gender actions.

In the second half of the 1980s, conceptual, institutional, and operational changes accelerated as management took a proactive stance toward gender issues. Beginning about 1986:

- Senior management and the Board provided steady, highly visible support and resources (and extra pressure as necessary) for gender-related action.
- A long-term, comprehensive program of operational support, and policy and

sectoral research was agreed upon by WID staff and Operations management.

- Resources earmarked for gender issues in the Bank budget and in trust funds greatly increased.
- A core of specialized staff was established, first in a central unit, then in the regions.
- A program of countrywide assessments of gender issues was undertaken as a basis for policy discussions with member countries regarding future projects.
- Monitoring and periodic progress reporting helped focus discussions between management and the Board.

The research program confirmed the relevance of gender issues to the attainment of the development objectives of member countries and the Bank, and it provided quantitative estimates of returns to gender-related actions. National assessments of gender issues helped strengthen member countries' awareness and commitment. Projects with gender-related action increased sharply in FY89, and stayed at 35 to 41 percent of the investment portfolio since FY91. Funded mostly through IDA, these projects sought to increase women's access to social and agriculture services in low-income countries. Projects approved in FY87-88 had clearer specification of objectives and better supervision than earlier projects, and gender-related actions received more attention from the countries' authorities.

In completed projects, approved from FY67 to FY88, the following conditions were found associated with satisfactory achievements of gender-related actions:

- Country involvement and commitment to gender-related actions and the project as a whole.
- The clear integration of gender-related objectives with overall project objectives.
- Presence of staff experienced in addressing gender issues.
- Supervision attention to gender-related interventions.

Overall, at least 615 of the 4,955 investment projects approved between FY67 and FY93 included some gender-related activity. Funding commitments for these projects totaled about \$31,814 million equivalent (constant 1993 dollars), or 9.1 percent of total investment commitments over the same period. The increase in attention to gender issues that started around 1986 is reflected in the portfolio: over half of the 615 projects were approved between FY89 and FY93, and overall only 196 had been completed at the time of this study.

Attention to gender was clearly associated with poverty and human resource development. Ninety-three percent of projects with gender-related action were in low-income and lower middle-income countries, and over two-thirds (410 projects) were funded through IDA funds. AFR had the largest number (41 percent), followed by South Asia and LAC (15 percent each). Human resource projects formed the largest sector (46 percent), followed by agriculture (39 percent).

In most cases, gender-related activities formed a relatively small part of project objectives, and they were subject to the same technical, institutional, and economic difficulties as any other project component. Furthermore, the performance of projects with gender-related action designed from FY67 to

FY84 was brought down by the large number of area development projects among them. It is not surprising therefore that no clear difference in overall outcomes could be established for projects with and without gender-related activity in the 196 projects completed so far.

Progress monitoring of attention to gender in the portfolio by PHRWD provided full coverage of approved projects for FY88 to FY93, but the database used a lenient rating process which overstates the presence of clear gender-related action. Data for earlier years have now been compiled, so a complete, albeit optimistic, data set is available for FY67 to FY93. The organization of an ESP monitoring unit working on both poverty and gender is a positive step, since attention to gender is often linked to poverty. Starting with FY94, ESP is using more elaborate criteria to jointly monitor progress related to poverty and to gender. The new system, designed after discussions with the regions and OED, cannot be assessed until after the results are available for a full year.

Recent developments are encouraging. In some countries, the preparation of country-wide gender assessments increased interaction between gender staff and sectoral task managers, strengthened the dialogue with the borrower, and helped focus Bank attention on issues in the country's legal and regulatory framework. This was reinforced in a few cases by discussion at the country's consortium of aid agencies. There is preliminary evidence that this process strengthened the borrowers' commitment to address gender issues and is leading to more systematic integration of these issues in project identification and design. In other countries, WID assessments were drafted but not always discussed with the borrower or not followed by the preparation of specific gender strategies as planned.

The introduction of gender specialists in the regions, first in technical departments, now also in some country departments and a few field missions, as well as in the central vice presidencies, has led to more diversity in focus and approaches. Recent innovations include the promotion of participatory approaches to involve women as well as men in project design and implementation, in poverty assessments, and in proposed social assessments. There is increased attention to gender in the financial services, natural resources management, water and sanitation, and urban sectors. Gender-related issues in economies in transition have been identified. The results of these developments will not be available to evaluation for several years, but synergy and close coordination between central and regional staff will remain essential.

Recent developments on participatory approaches to development and on the use of social assessments are also relevant for gender issues. The forthcoming report *The World Bank and Participation* (draft June 10, 1994) recommends that the Bank support an enabling environment for participatory development within client countries, and improve the quality and breadth of participation in the Bank's own practices. This requires identification and involvement of relevant stakeholders, including women. Guidelines on gender issues and participation are being developed. Guidelines on "Social Assessments—Incorporating Participation and Social Analysis into the Bank's Operational Work" (draft May 1994) describe the process through which the social factors that affect development impacts and results are identified during ESW and project design. This includes identifying and understanding relevant differences in gender roles and status. Participatory development and social assessments both help make gender differences more

visible, and therefore more difficult to ignore.

Throughout the 1970s and 1980s, the Bank kept a cautious stance on a subject that continued to be called new, complex, and sensitive. Gender issues are complex and culturally defined. Interventions that could entail changes in gender roles are therefore sensitive. Yet such changes often occur spontaneously and quickly, as economic and technological conditions evolve.

With the approval of a policy paper and an operational policy in April 1994, the use of gender-related strategies in sector work and operations gained full legitimacy. Many prerequisites for a full integration of gender issues in the development process are now in place: a clear policy on the subject, strong support from the Board and many senior managers, well-documented research findings, dedicated staff at central and regional levels, and a marked increase in the availability of information on women's roles at the country level. The focus can now be on developing the subject further within the Bank's dialogue with member countries, and on implementing the Bank's policy paper and operational directive.

Suggestions and recommendations

Management support and funding

To maintain the current momentum, evidence of strong support by every level of management and the Board will be essential. Sufficient resources, frequent evidence of support by senior management, and regular progress monitoring will be necessary. Other agencies with clear priority to gender issues in their program found that momentum could be lost for lack of resources, incentives, and monitoring (see Annex 4). A Fund

for Participatory Approaches had been available to task managers in FY94 for innovative attempts to use participatory approaches. For FY95, a \$2 million Fund for Innovative Approaches in Human and Social Development will be available for activities that contribute to increased participation and for social assessments. The Fund will be managed by the Operations Policy Department (OPR) in consultation with the Environment Department.¹ The funds are available to regional and central vice presidencies for "innovative approaches in human and social development" that improve the quality of Bank operations, and particularly for innovative approaches to promote the participation of stakeholders in planning and implementing development projects, and to undertake social assessments. Since gender issues are a core element of human and social development, actions that address them are appropriate for support from this Fund.

- *Recommendation 1:* That OPR promote, through the Fund for Innovative Approaches in Human and Social Development, the testing of innovative ways to increase the participation of women in development planning and actions, or to better integrate gender issues in social assessments.

Economic and sector work, poverty assessments, and country assistance strategy

The 1994 policy paper on gender rightly recommends that gender issues be addressed in poverty assessments and country assistance strategy papers. Some poverty assessments have used innovative ways to obtain the views of women and children as well as those of men. But poverty assessments do not cover issues of general economic importance outside of poverty and do not, therefore, provide all of the information

necessary to identify and prioritize gender-related issues.

Statements on gender issues in the country assistance strategy paper (CAS), which is limited to fifteen pages overall, are inevitably brief.² For such a statement to help ensure that the borrower and sectoral staff agree on issues and priorities, it must be the product of ongoing discussions among the borrower, the country team, and the department management team. Given the diversity in member countries and in gender work by country departments, the steps leading to the preparation of the CAS statement inevitably vary. Where work in a country is not sufficiently developed to support a meaningful CAS statement, involvement of staff with gender experience in CAS preparation or in reviews of the portfolio, and discussion with the borrower during a country implementation review, a special workshop (or discussion at the consortium of development agencies), or an assessment of gender issues at country level may prove useful in increasing understanding of gender issues at the country level and in strengthening the rapport with borrowers. Each country department should assess which, if any, of these steps would be useful. Operational policy already stipulates that implementation of country strategy on gender be monitored during country implementation reviews.

- *Recommendation 2:* That each country department review existing information on gender at an early phase of CAS preparation to determine what steps—if any—are needed to ensure that the CAS statement on gender contributes to the policy discussion with member countries.

Gender-related actions are more likely to be implemented if borrower staff fully support them and are committed to making them successful. The process of discussing gender

issues at the country and sector levels may help inform and convince project staff of the gender actions' relevance for successful implementation, as does the involvement of gender specialists during implementation. Opportunities for member countries and Bank staff to discuss gender issues outside the immediate concern of a specific project could help build up a better dialogue. The Economic Development Institute is planning to hold multiyear learning programs to engage Bank staff and borrowers in a discussion of cross-sectoral themes. Gender issues are particularly appropriate for these sessions and the Economic Development Institute is encouraged to consider organizing, in cooperation with concerned Bank units, a learning program on gender issues for Bank staff and borrowers.

Project design, implementation, and supervision

The implications of gender differences should be analyzed as part of a broader social and economic analysis when the project's specific objectives are being established. Activities added later on to avoid deleterious effects on women are less likely to be implemented and supervised properly, and their goals are less likely to be achieved. The Social Assessment Guidelines provide guidance to task managers on integrating social issues into project objectives, guidelines on how gender issues can be addressed in project work are available for some sectors, and technical support by gender specialists is available in the regions and in central vice presidency.

Suggestion 1: That managers encourage staff to address gender issues as appropriate, and to use available support and guidelines.

Suggestion 2: That the terms of reference for sector and operations work include explicit

questions on gender issues whenever these issues are likely to be relevant.

Whenever appropriate, progress indicators should measure outcomes on men and women separately. Monitoring plans should therefore include the collection of sex-disaggregated data, separating the views of female and male beneficiaries.

- *Recommendation 3:* Operations managers should ensure that progress indicators include separate targets for men and women (or boys and girls) whenever appropriate.

Supervision missions need to be more explicit in their attention to the social aspects of project implementation—including but not limited to—gender, as specified by Bank directives at least since 1984.

Suggestion 3: That task managers consider using thematic supervision focused on gender dimensions for selected projects, when it is desirable to identify the reasons for implementation difficulties or to strengthen the borrower's understanding of gender issues.

Suggestion 4: That task managers consider having an experienced gender specialist take part in preappraisal and one early supervision mission to help task managers identify what they will need to look for during subsequent supervisions.

Technical support to Bank staff and borrowers

In the words of a task manager, it is essential "to put gender issues in [the task manager's] critical path." The study identified several cases where task managers modified their behavior after having worked in the field

with persons experienced in gender issues. This on-the-job training should be encouraged. The program now being initiated by the GAP team is expected to provide task managers with the practical guidance they need through training sessions defined jointly with individual regions and the preparation of brief summaries of issues and operational examples. Gender issues should also continue to be integrated in sector training as appropriate. To provide task managers with appropriate support at an early stage of the project cycle, gender teams in several regions established a systematic review of the initial executive project summary. The experience so far has been positive and these reviews are expected to continue.

Evaluations

Midterm reviews provide a key opportunity to assess progress on gender-related action and can lead to revisions in strategy.

Suggestion 5: That midterm reviews assess gender-differentiated outcomes and likely impact—whether a gender-related action was included in project objectives or not—so that unexpected adverse results can be corrected and positive results encouraged.

The implementation completion report should also look at gender-differentiated results. Findings should be included in the section on lessons learned so that they can influence follow-up projects.

- *Recommendation 4:* That the lessons section of the implementation completion report include findings on gender-differentiated outcomes and innovative approaches to the integration of gender issues uncovered during project design and implementation.

Ex post evaluations

OED audits, impact evaluations, and studies should make every effort to assess the results of gender-related action and gender-differentiated impact. This will require better documentation in project files, midterm evaluations, and implementation completion reports. As more projects approved under the WID initiative come to completion, the opportunities for evaluating gender-related actions through all OED products will increase. OED should continue to identify those projects under implementation that are candidates for a cluster evaluation on the impact of gender-related development strategies.

- *Recommendation 5:* That OED look for lessons on gender issues when selecting projects for audits, impact evaluations, and country studies.

Suggestion 6: That a review of the Bank's experience with WID-only projects be conducted once the current projects are completed.

Suggestion 7: That terms of reference for OED audits, impact evaluations, and studies include specific questions on the differential effect for men and women (or boys and girls) as appropriate.

Lessons for other cross-sectoral issues

The history of gender in Bank lending shows how an institution organized by sectors and geography sought to integrate an issue affecting its work in many sectors. Networking and grassroots interest by staff was not in itself sufficient to bring about structural and policy changes, and neither was outside pressure. But the two together did play a catalytic role in obtaining man-

agement support. Strong management support, reiterated often and accompanied by resources, was needed to establish a more systematic effort; outside resources played a key role for implementation of this effort. The presence of experienced and dedicated staff in the regions as well as in a central vice presidency helped adjust research, ESW, and project work to regional diversity and provide technical support to task managers.

For further study

The high quality of Bank research is generally recognized both inside and outside the institution. When PHRWD initiated a research program on gender issues, it was with the explicit intent to demonstrate to Bank staff the validity and relevance of those issues for their work. While the program took longer to implement than expected, it did produce some high quality work which caught the attention of staff and management. Further research needs are likely to vary across regions.

As more experience accumulates, the synergy between country-level attention to gender in individual projects, gender assessments, poverty assessments, and country assistance strategy should be studied. Bank staff have reported that preparing country-level assessments of gender-related problems and strategies has helped to strengthen commitment to gender issues within the borrowing country. This, and other factors that can influence the borrowers' decision to incorporate gender issues in development planning, need to be better understood through analytical work at the country department level, and through case studies for selected countries.

The apparent increase in attention to gender in projects prepared in a participatory manner should be further reviewed during implementation and through ex post evaluations.

Notes

1. Memorandum from Operations Policy Department acting director to Central and Operations managers, June 1, 1994.
2. See BP 2.11, Annex 1.

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Annex 1: Study methodology

Overall organization

This study focuses on the way in which the World Bank has paid attention to gender issues over time, as well as the results in economic and sector work and the portfolio. As explained in Box 1.1, assessing this cross-sectoral topic in the Bank portfolio presents two difficulties. First, there is no common standard to differentiate a good from a bad project with regard to gender issues. Second, there is no comprehensive database covering the entire study period.

The study draws from three major areas of work: (a) the identification of projects with gender-related action in the total investment portfolio for FY67-93; (b) detailed analysis of implementation and performance for two clusters of projects and detailed review of selected economic and sector work (ESW); and (c) detailed review of conceptual and institutional evolution related to WID and gender issues. For each of these three areas, reviews of files and documents were combined with interviews of staff and retirees.

Identification and analysis of 615 projects with gender-related actions in the portfolio, FY67-93

A total of 4,955 investment projects were approved between FY67 and FY93.¹ There

were three stand-alone women in development (WID) projects, but no comprehensive information on which other projects had components or activities related to gender issues. Such a list was established through an iterative review process, using the ratings system created by the Women in Development Division, Population and Human Resources Department (PHRWD) in 1987, on the basis of the sources of information discussed below.

Database created by PHRWD with ratings of projects at approval stage. PHRWD reviewed all projects at approval, starting in FY88 throughout FY93, to judge attention to women in development. Project documents [staff appraisal reports (SAR), Memoranda to the President (MOP) and legal documents] were reviewed for all projects at the time of Board approval and rated on a five-point scale. For reporting purposes, the scale was clustered into a three-level rating: projects with no attention to women were rated 0; projects with some discussion of gender or WID issues but no action specifically designed to address them were rated 1; and projects with concrete, specific activities addressing WID or gender-related issues were rated 2. The database included 390 projects, most of which are still active. Given its specific focus on gender and the distinction between projects with action and those

without, this database provided the data used in this study for FY88 to FY93. The percentages of projects with gender-related action in this report differ slightly from those given in PHRWD progress reports, for two reasons. First, since practically all projects with gender-related action are investment projects, OED calculated percentages against all investment projects only, while PHRWD gave percentages of projects with gender-related action against all lending operations. Second, PHRWD made some corrections in its database after some of its early reports were issued. After further checks by OED, a few more errors (project duplication) were corrected, slightly lowering the total number of projects with gender-related action for FY88-93.

WID module of the Bank reports database. The database of Bank reports maintained by the Internal Documents Unit (IDU) includes an analysis field with detailed text summaries of SAR/MOP components that emphasize women in development objectives. This field is linked to the project's abstract, but is not accessible through All-in-One. It was not mentioned during queries to Information Technology Facility Department staff on the content of the Bank reports database, but was rediscovered through mentions in institutional files from the mid-1980s. This module, which covers FY67 to FY93, started from a monitoring system established by the first WID advisor, later computerized under the MINISYS system, and finally merged with IDU data. Although the coverage of the analysis field with respect to WID is incomplete, there were 587 projects with some WID information. The study team reviewed all these summaries and rated each project using the PHRWD system. Over 200 projects with report dates before FY88 were found to have gender-specific action and added to the projects identified through the PHRWD database.

OED reviews of the portfolio. The OED evaluation textbase was searched by keywords to identify project completion reports (PCRs), audits, and study reports that discuss gender-related issues. The SARs and MOPs were then reviewed and rated, using the same rating system developed by PHRWD for its WID database.

Review of printed reports. All Bank Annual Reports, World Development Reports, major WID publications, and various regional and sectoral reviews were checked to identify relevant projects, and these were then reviewed and rated using the PHRWD rating system.

A total of 615 projects were identified through these various sources (which greatly overlapped) and compiled into the first comprehensive list of Bank-funded projects with **intended** gender-specific action. This sample provides strong coverage of projects approved between FY67 and FY93.

It should be noted that most of the sources cited here are relatively recent and cover projects still under implementation. They all cover **intended** gender-related actions at appraisal, and do not distinguish gender-action components by size in relation to the overall project cost or lending amount. Their major drawback is that they do not reflect what was achieved; this can only be investigated for selected project clusters.

ESW focusing on WID or gender issues were identified through published lists of WID assessments and through a search of the Bank Reports database.

Management information system (MIS) program objectives codes. The Operations Complex characterizes projects at the appraisal stage with respect to main program objectives: poverty alleviation, WID, environ-

ment, private sector. This information covers more than 90 percent of the projects approved each year since FY85, but coverage declines rapidly for earlier years. The task manager is asked to indicate up to five program objectives per project and to give estimates of time inputs (in percentages) for the relevant project objectives codes as appropriate (overlaps are possible, so the total percentage allocated can be greater than 100 percent). Although incomplete and subjective, the MIS allocation to project objectives codes is indicative of the level of effort focused on gender-related action. It does not approximate actual spending.

Review of project and ESW clusters

Two clusters of investment projects were reviewed: all 36 projects cited in the 1979 document *Recognizing the 'Invisible' Woman in Development* and the 24 projects approved in FY87-88 were rated 2—that is, as having some type of gender-related action on the basis of the SAR and president's report, and expected to be completed by June 1994 at the time of study design.

For each of these projects, all documents from SAR to PCR or audit were reviewed, together with the project files and supervision reports, using a standard questionnaire. Achievements of the gender-related actions were rated against their stated objectives, and quality of supervision was assessed through evidence of attention to gender issues in supervision reports or aide-memoires. The Annual Review on Portfolio Performance ratings were obtained from the MIS, the OED ratings from the OED Annual Review database. Staff (and in a few cases consultants) involved were interviewed whenever possible, after the files review had been conducted.

A matrix was built for the two clusters around the factors for which data was available for enough projects to be analyzed. Analyses of frequency distribution and patterns of associations between factors were used to identify factors most frequently related to satisfactory implementation of the gender-related actions. This was done for each cluster separately, then for the two clusters combined.

Eleven of the WID or gender assessments conducted since the mid-1980s were reviewed in depth and a matrix of sectoral and topical coverage constructed. Again, task managers for the assessments were interviewed, together with other staff involved in the process. These interviews focused on interactions between gender specialists, operations staff, and borrower staff during and after preparation of the WID assessment, and on evidence of follow-up in individual projects.

Review of conceptual and institutional history

One objective of the study was to describe how decisions regarding WID or gender issues were reached, announced, and/or implemented. This was done through review of archives and other documents, and through interviews. Archival research included review of files identified by archives and other sources as relevant to policy and institutional decisions and their implementation, including but not limited to: files of the first and second WID advisors; minutes of the president's council and executive directors, Development Committee, operational vice presidents' and department directors' meetings; files of the Staff Association and Status of Women Working Group; files and documents related to the background paper on WID for the World

Bank History Project; and files and documents provided by retirees, central, and regional staff.

Key documents that reflect Bank policies for treatment of gender issues were reviewed: Annual Reports and World Development Reports beginning in the 1970s; sector policy documents; public-relations pamphlets and progress reports on women in development and gender issues. Speeches by Bank presidents and other key managers were reviewed to identify official perceptions of women in development as a priority issue and the Bank's promises of action. A review of relevant writings outside the Bank covered books and articles on WID and gender issues and related events in the development community, focusing on references to the World Bank's performance in addressing WID/gender; documentation of other donors' efforts to address WID and gender (bilateral and multi-lateral); donor-coordination mechanisms

(such as the Development Assistance Committee/WID group) and the proceedings of key UN bodies working on WID; and evaluations of other agencies' efforts.

In-depth interviews were conducted with key managers and staff involved in actions regarding women in development, as well as with a few Bank outsiders (following an initial period of archival research). Efforts focused on the early years (1970s-early 1980s) for which the institutional memory is weakest and on staff involved in grassroots efforts (because of relatively less official documentation). Interviews were based on written, mostly open-ended questions.

Note

1. This list is from the Operation's Management Information System (MIS) excluding supplements and structural/sectoral adjustment or debt reduction projects.

Annex 2: Basic data

ANNEX TABLE 2.1: INVESTMENT PROJECTS WITH GENDER-RELATED ACTION, ACROSS REGION, BY APPROVAL FISCAL YEAR

Region	Approval Fiscal Year																			Total			
	67-72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90		91	92	93
Africa	3	2		5	5	3	9	7	7	12	10	12	7	4	3	9	12	24	27	34	29	27	251
East Asia and Pacific	3		2			3	4	5	5	1	2		2		1		2	6	7	12	14	12	81
Middle East & North Africa	2		1	1	2	1	5	5	3	7	3	5	4	3	2	4	2	5	3	8	3	8	77
Latin America & Caribbean	1	1	1	2	2	2	6	5	3	4	8	2	1	1	4	2	2	2	9	8	11	14	91
Europe & Central Asia		1							1	1	1	1		1		1	1	1	1	3	3	5	21
South Asia			1	1		2	1	3	5	3	2	4	4	6	3	1	4	5	11	15	10	13	94
Total	9	4	5	9	9	11	25	25	24	28	26	24	18	15	13	17	23	43	58	80	70	79	615

ANNEX TABLE 2.2: INVESTMENT PROJECTS WITH GENDER-RELATED ACTION, AS A PERCENTAGE OF THE INVESTMENT PORTFOLIO, ACROSS REGION, BY APPROVAL FISCAL YEAR

Region	Approval Fiscal Year																			Total			
	67-72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90		91	92	93
Africa	2	5	0	8	8	5	13	10	11	17	13	16	10	5	5	14	18	35	39	52	47	38	16
East Asia and Pacific	3	0	7	0	0	8	11	12	12	3	5	0	6	0	2	0	5	17	21	32	31	27	9
Middle East & North Africa	4	0	4	4	8	4	22	19	11	27	10	19	17	13	13	20	13	25	18	47	20	42	15
Latin America & Caribbean	1	4	3	6	5	4	13	11	6	8	16	5	3	3	11	4	7	6	26	24	30	33	9
Europe & Central Asia	0	13	0	0	0	0	0	0	5	6	6	8	0	8	0	10	9	10	8	21	25	19	6
South Asia	0	0	7	5	0	6	3	8	14	9	6	11	10	18	10	3	13	19	46	52	48	57	14
Total	2	3	3	5	4	5	11	10	10	12	11	11	8	7	6	8	12	22	31	41	36	35	12

Note: Investment projects exclude SAL, SECAL, and debt reduction lending. Regional data for the overall investment portfolio are from the Bank's Management Information System (MIS).

ANNEX TABLE 2.3: INVESTMENT PROJECTS WITH GENDER-RELATED ACTION, ACROSS SECTOR, BY APPROVAL FISCAL YEAR

Sector	Approval Fiscal Year																				Total			
	67-72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91		92	93	
Agriculture	2	1	4	2	5	5	9	7	10	13	15	10	5	5	4	8	9	20	23	24	30	27	238	
Energy									1	1										2			4	
Finance								2						1				4	2	5			14	
Human resources	7	3	1	5	4	5	7	13	10	10	8	11	13	8	9	9	13	16	25	38	30	39	284	
Industry				1			1														1	1	2	6
Other																		2		2	1	3	8	
Power																	1					2	3	
Telecommunications																						1	1	
Tourism																							0	
Transport										1									2	1	1	1	6	
Urban				1		1	8	3	3	3	3	2		1					5	4	2	2	38	
Water and sanitation												1						1	1	3	3	4	13	
Total	9	4	5	9	9	11	25	25	24	28	26	24	18	15	13	17	23	43	58	80	70	79	615	

ANNEX TABLE 2.4: INVESTMENT PROJECTS WITH GENDER-RELATED ACTION, AS A PERCENTAGE OF THE INVESTMENT PORTFOLIO, ACROSS SECTOR, BY APPROVAL FISCAL YEAR

Sector	Approval Fiscal Year																				Total			
	67-72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91		92	93	
Agriculture	1	2	8	3	8	6	10	8	12	16	22	15	9	8	8	14	17	43	47	57	59	63	16	
Energy									8	8										18			3	
Finance								13						11				24	20	50			4	
Human resources	11	16	9	24	18	26	32	59	59	53	38	39	52	31	33	47	48	52	69	72	75	70	46	
Industry				7			8													10	33	33	2	
Other																		13		14	5	9	3	
Power																	6				12		1	
Telecommunications																						20	1	
Tourism																							0	
Transport										3										9	5	5	3	1
Urban				17		25	73	43	33	43	27	14		11						29	27	15	18	18
Water and sanitation												6						10	8	30	27	33	5	
Total	2	3	3	5	4	5	11	10	10	12	11	11	8	7	6	8	12	22	31	41	36	35	12	

ANNEX TABLE 2.5 INVESTMENT PROJECTS WITH GENDER-RELATED ACTION, COHORT PERCENTAGES, ACROSS SELECTED SUBSECTORS, BY APPROVAL FISCAL YEAR

Subsector	Approval Fiscal Year																				Total		
	67-72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91		92	93
<i>Education</i>																							
% of gender human resources	86	100	100	80	75	40	71	77	60	90	75	45	77	63	33	56	46	38	32	29	50	44	51
% of portfolio education	11	18	11	21	15	13	25	56	46	50	32	24	53	26	19	38	32	30	44	42	63	53	32
<i>Research & extension</i>																							
% of gender agriculture										14	10			40	25	25	11	25	26	25	13	7	13
% of portfolio R&E										17	25			22	33	20	50	56	60	86	67	67	28
<i>Area development</i>																							
% of gender agriculture	100				40	60	89	57	40	85	80	80	100	20	25	25	56	25	17	17	10	19	37
% of portfolio area development	10				11	12	35	19	18	65	52	35	31	6	10	13	45	63	44	67	43	83	26

Note: Sector classifications for ongoing projects were taken from the Bank's Management Information System (MIS) and mapped to OED headings. This mapping was one-for-one except for the following cases: Human Resource = MIS's (PHN + Education); Industry = MIS's (Industry/IDF + Min & Other Extraction); Other = OED's Non-Sector Specific + MIS's (Public Sector Management + Multisector + Environment + Technical Assistance). Investment projects exclude SAL, SECAL, and debt reduction lending. Historical data on area development projects was provided by PBDPS.

ANNEX TABLE 2.6: INVESTMENT PROJECTS WITH GENDER-RELATED ACTION, ACROSS INCOME GROUP, BY APPROVAL FISCAL YEAR

Income group	Approval Fiscal Year																				Total		
	67-72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91		92	93
Low income (small)	4	2		4	4	5	10	13	11	15	10	13	10	9	5	9	14	26	30	46	36	37	313
Low income (large)			1			1			3	1	2	2	1	2	1		3	5	8	8	11	11	60
Middle income (lower)	5	2	3	4	4	4	13	9	7	9	10	7	6	3	4	4	5	11	18	20	20	28	196
Middle income (upper)			1	1	1	1	2	3	3	3	4	2	1		3	3	1	1	2	6	3	3	44
High income														1									1
Other																1							1
Total	9	4	5	9	9	11	25	25	24	28	26	24	18	15	13	17	23	43	58	80	70	79	615

ANNEX TABLE 2.7: INVESTMENT PROJECTS WITH GENDER-RELATED ACTION, AS A PERCENTAGE OF THE INVESTMENT PORTFOLIO, ACROSS INCOME GROUP, BY APPROVAL FISCAL YEAR

Income group	Approval Fiscal Year																				Total		
	67-72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91		92	93
Low income (small)	2	4		5	5	6	11	12	11	15	9	13	11	9	6	10	16	29	36	51	46	42	15
Low income (large)			14			8			19	7	15	10	4	8	4		13	22	50	40	44	35	15
Middle income (lower)	2	4	4	6	5	4	14	10	8	10	11	9	9	5	6	7	9	19	29	30	32	39	11
Middle income (upper)			4	5	3	3	6	10	9	11	15	8	4		11	9	4	5	8	32	14	10	7
High income														100									2
Other																100							3
Total	2	3	3	5	4	5	11	10	10	12	11	11	8	7	6	8	12	22	31	41	36	35	12

Note: Investment projects exclude SAL, SECAL, and debt reduction lending. Income group classifications are from the Bank's Management Information System.

ANNEX TABLE 2.8: AVERAGE ARPP OVERALL RATINGS, BY FISCAL YEAR

<i>Cohort average</i>	<i>ARPP fiscal year</i>														<i>All years</i>
	80	81	82	83	84	85	86	87	88	89	90	91	92	93	
Investment projects with gender action	1.67	1.70	1.82	1.79	1.85	1.88	1.98	1.92	1.85	1.81	1.85	1.91	1.91	1.95	1.87
Other investment projects in the portfolio	1.72	1.82	1.82	1.82	1.78	1.75	1.84	1.85	1.81	1.83	1.92	1.99	1.99	1.96	1.85
Gender action relative to other investment projects	-3%	-6%	-0%	-1%	4%	7%	7%	4%	2%	-1%	-4%	-4%	-4%	-1%	1%

ANNEX TABLE 2.9: DISTRIBUTION OF "OLD" AND "NEW" CLUSTERS

<i>Sector</i>	<i>Africa</i>		<i>East Asia & Pacific</i>		<i>South Asia</i>		<i>Europe & Central Asia</i>		<i>Latin America</i>		<i>Middle East & N. Africa</i>		<i>Total for all regions</i>	
	<i>Old</i>	<i>New</i>	<i>Old</i>	<i>New</i>	<i>Old</i>	<i>New</i>	<i>Old</i>	<i>New</i>	<i>Old</i>	<i>New</i>	<i>Old</i>	<i>New</i>	<i>Old</i>	<i>New</i>
Agriculture	6	8	0	0	3	1	0	0	2	1	0	1	11	11
Finance	1	0	1	0	1	0	0	0	0	0	0	0	3	0
Human resources	3	6	6	1	2	1	0	0	3	2	2	2	16	12
Tourism	0	0	0	0	0	0	0	0	1	0	0	0	1	0
Urban	2	0	0	0	0	0	0	0	2	1	1	0	5	1
Total	12	14	7	1	6	2	0	0	8	4	3	3	36	24

Note: ARPP ratings are from the Bank's Management Information System. Averages are based on projects in the active portfolio with a rating of 1, 2, 3, or 4. Investment projects exclude SAL, SECAL, and debt reduction lending.

ANNEX TABLE 2.10: PROJECTS CITED IN THE 'INVISIBLE' WOMAN REPORT, OLD CLUSTER

Country	Region	Sector	Title	Approval date	Loan/credit number	Amount approved (US\$ mill.)	Original completion FY	Actual completion FY	OED overall rating
Botswana	AFR	Urban	Francistown Urban Development	04/16/74	C0471	3.00	15-Mar-78	15-Sep-79	Sat.
Burkina Faso	AFR	Urban	Urban Development Project	01/31/78	C0766	8.20	31-Mar-83	27-Sep-84	Sat.
Burundi	AFR	Agriculture	First Forestry Project	05/24/79	C0918	4.30	30-Apr-83	22-Sep-86	Sat.
Cameroon	AFR	Agriculture	Semry Rice Project	01/25/72	C0302	3.70	15-Dec-82	15-Dec-86	Sat.
Cameroon	AFR	Agriculture	Zapi Integrated Development Project	03/07/78	C0776	8.50	31-Mar-78	15-Sep-79	Unsat.
Côte d'Ivoire	AFR	Agriculture	SAPH Rubber Project	11/21/78	L1633	7.60	30-Sept-82	30-Sep-83	Sat.
Kenya	AFR	Agriculture	Bura Irrigation Settlement Project	06/07/77	C0722/L1449	40.00	31-Dec-81	31-Dec-85	Unsat.
Lesotho	AFR	Human resources	Second Education Project	11/15/77	C0748	7.50	30-Jun-84	31-Mar-85	Sat.
Malawi	AFR	Agriculture	Lilongwe Agriculture Development	02/01/68	C0113	7.17	15-Jun-75	15-Jul-75	Unsat.
Mauritius	AFR	Finance	Development Bank of Mauritius Project	06/20/72	C0313	15.20	18-Apr-81	18-Apr-85	Sat.
Mauritius	AFR	Human resources	Second Education Project	03/30/78	L1543	3.50	31-Dec-83	30-Jun-85	Sat.
Somalia	AFR	Human resources	Third Education Project	08/09/77	C0738	8.00	30-Sep-82	30-Sep-83	Sat.
Indonesia	EAP	Human resources	Nutrition Development Project	03/01/77	L1373	30.00	15-May-79	15-Mar-81	Sat.
Indonesia	EAP	Human resources	First Nonformal Education Project	09/06/77	L1486	26.00	15-Jul-80	31-Dec-84	Sat.
Malaysia	EAP	Human resources	Fourth Education Project	09/21/76	L1329	70.00	15-Jun-82	15-Mar-83	Sat.
Malaysia	EAP	Human resources	Fifth Education Project	01/30/79	L1657	76.00	15-Sep-82	15-Sep-84	Sat.
Papua New Guinea	EAP	Human resources	Education Project	10/19/76	C0661	4.00	15-Dec-82	15-Dec-83	Sat.
Philippines	EAP	Finance	Small/Medium Industries Dev. Project	05/23/75	L1120	30.00	15-Dec-79	15-Mar-88	Sat.
Thailand	EAP	Human resources	Population Project	02/07/78	C0767	33.10	15-Jun-79	15-Dec-82	Sat.
Bolivia	LAC	Agriculture	Ulla Ulla Development Project	01/12/78	C0762/L1510	36.00	31-Dec-82	15-Jun-86	Unsat.
Bolivia	LAC	Urban	Urban Development Project	10/04/77	L1489	17.00	15-Mar-81	15-Dec-82	Sat.
Brazil	LAC	Agriculture	Paraiba Rural Development Project	03/28/78	L1537	24.00	15-Dec-72	15-Aug-72	Unsat.
Colombia	LAC	Human resources	Integrated Nutrition Improvement	09/13/77	L1487	25.00	15-Oct-84	15-Mar-87	Sat.
Dominican Rep.	LAC	Human resources	First Population Project	09/14/76	L1325	5.00	15-Jun-80	15-Jul-85	Sat.
El Salvador	LAC	Urban	Second Urban Project	06/23/77	C0726/L1465	25.40	15-Jul-80	31-Dec-84	Sat.
Mexico	LAC	Tourism	Zihuatanejo Tourism Project	12/21/71	L0793	22.00	31-Mar-82	30-Jun-85	Sat.
Trinidad & Tobago	LAC	Human resources	Population Project	05/25/71	L0743	3.00	15-Dec-74	15-Dec-79	Sat.
Morocco	MNA	Urban	Rabat Urban Development Project	02/28/78	L1528	18.00	15-Mar-81	15-Dec-85	Sat.
Syria	MNA	Human resources	First Education Project	07/12/77	L1480	20.00	15-Jun-82	31-Dec-83	Sat.
Yemen	MNA	Human resources	Second Education Project	02/10/76	C0611	8.00	15-Aug-78	15-Sep-81	Sat.
Bangladesh	SAS	Human resources	First Population Project	02/25/75	C0533	7.00	06-Feb-83	05-Feb-85	Unsat.
Bangladesh	SAS	Finance	Second Small Scale Industry Project	06/08/78	C0825	15.00	31-Mar-83	27-Sep-84	Sat.
India	SAS	Agriculture	Karnataka Daisy Development Project	06/13/74	C0482	16.40	19-Oct-81	18-Oct-84	Sat.
India	SAS	Agriculture	Rajasthan Dairy Development Project	12/05/74	C0521	27.70	15-Dec-74	15-Oct-79	Sat.
India	SAS	Agriculture	MP Dairy Development Project	12/05/74	C0522	30.00	15-Jun-82	15-Feb-83	Unsat.
Pakistan	SAS	Human resources	Third Education Project	01/25/77	C0678	15.00	15-Jun-79	15-Dec-80	Sat.

ANNEX TABLE 2.11: PROJECTS WITH GENDER-RELATED ACTION, APPROVED IN FY87/88 AND TO BE COMPLETED BY JUNE 30, 1994, NEW CLUSTER

<i>Country</i>	<i>Region</i>	<i>Sector</i>	<i>Title</i>	<i>Approval date</i>	<i>Loan/credit number</i>	<i>Amount approval (US\$ mill.)</i>
Benin	AFR	Agriculture	Second Borgou Rural Development Project	02/16/88	C1877	21.00
Burundi	AFR	Human resources	Population and Health Project	12/15/87	C1862	14.00
Ethiopia	AFR	Agriculture	Small Scale Irrigation & Conservation Project	03/03/87	C1765	7.00
Ethiopia	AFR	Agriculture	Fourth Livestock Project	04/28/87	C1782	39.00
Gambia	AFR	Human resources	National Health Development Project	02/17/87	C1760	5.60
Guinea	AFR	Human resources	Health Services Development Project	07/07/87	C1837	19.70
Kenya	AFR	Agriculture	National Agriculture Research Project	10/20/87	C1849	19.60
Malawi	AFR	Human resources	Education Sector Credit Project	03/24/87	C1767	27.00
Malawi	AFR	Human resources	Second Family Health Project	03/24/87	C1768	11.00
Senegal	AFR	Agriculture	Fourth Irrigation Project	12/01/87	C1855	33.60
Somalia	AFR	Agriculture	Second Agriculture Extension Project	05/12/87	C1794	12.70
Togo	AFR	Agriculture	Third Coffee & Cocoa Development Project	12/09/86	C1745	17.90
Uganda	AFR	Agriculture	SW Regional Agricultural Rehab. Project	01/12/88	C1869	10.00
Zimbabwe	AFR	Human resources	Family Health Project	07/22/86	L2744	10.00
China	EAP	Human resources	Technical Training Project	05/24/88	C1908	50.00
Bolivia	LAC	Urban	Second Emergency Social Fund Project	03/01/88	C1882	27.00
CDB	LAC	Human resources	Fourth Caribbean Development Bank Project	04/28/87	C1785	6.00
Mexico	LAC	Agriculture	Agricultural Extension Project	06/25/87	L2859	20.00
Mexico	LAC	Human resources	Man Power Training Project	10/06/87	L2876	80.00
Oman	MNA	Human resources	Health Project	05/05/87	L2807	13.30
Yemen	MNA	Agriculture	Southern Regional Agricultural Dev Project	03/31/87	C1772	12.30
Yemen	MNA	Human resources	Teacher Training Project	03/31/87	C1773	10.40
India	SAS	Agriculture	Second National Dairy Project	12/15/87	C1859	160.00
Pakistan	SAS	Human resources	Third Primary Education Project	06/16/87	C1821	145.00

ANNEX TABLE 2.12: NEW CLUSTER ARPP OVERALL RATINGS, BY ARPP FISCAL YEAR

		ARPP fiscal year								Period avg.	Rated year
		87	88	89	90	91	92	93	94		
Benin	Second Borgou Rural Development Project			1	1	1	2	2	2	1.50	6
Burundi	Population and Health Project		1	1	2	2	2	2	2	1.71	7
Ethiopia	Fourth Livestock Project	1	2	2	2	2	2	2	2	1.88	8
Ethiopia	Small Scale Irrigation and Conservation Project		2	2	2	2	2	3	3	2.29	7
Gambia	National Health Development Project	1	1	2	2	2	2	1	1	1.50	8
Guinea	Health Services Development Project		1	2	2	2	3	2	2	2.00	7
Kenya	National Agriculture Research Project			2	2	2	2	2	2	2.00	6
Malawi	Second Family Health Project		2	1	2	2	2	2		1.83	6
Malawi	Education Sector Credit Project	1	2	2	2	3	2	2	2	2.00	8
Senegal	Fourth Irrigation Project		2	2	3	2	2	2	2	2.14	7
Somalia	Second Agriculture Extension Project		2	2	2	4	4	4	4	3.14	7
Togo	Third Coffee and Cocoa Development Project	1	1	2	2	2	3			1.83	6
Uganda	SW Regional Agric. Rehabilitation Project			2	3	3	2	2	2	2.33	6
Zimbabwe	Family Health Project	1	1	1	1	2	1			1.17	6
China	Technical Training Project			1	1	1	1	1	1	1.00	6
Oman	Health Project		1	1	3	3	2	2	2	2.00	7
Yemen	Southern Regional Agric. Development Project		2	2	2	2	2	2	2	2.00	7
Yemen	Teacher Training Project		1	1	2	2	1	2	2	1.57	7
Bolivia	Second Emergency Social Fund Project		1	1	1	1	1			1.00	5
CDB	Fourth Caribbean Development Bank Project	1	2	2	2	1	2	2	2	1.75	8
Mexico	Agricultural Extension Project		2	2	2	2	2	2		2.00	6
Mexico	Man Power Training Project		1	1	1	1	1	1	1	1.00	7
India	Second National Dairy Project		2	1	1	1	1	2	2	1.43	7
Pakistan	Third Primary Education Project		2	3	2	3	2	2	2	2.29	7
"New" cluster average										1.81	6.75

Annex 3: Gender training at the World Bank and in other agencies, FY82-93

Training activities organized by the World Bank in the early 1980s developed a new approach to gender training that combined the case method and gender analysis. While the first seminars had limited impact on Bank staff, their contribution to the concepts of gender training was significant. This annex documents Bank training on gender between FY82-93 and summarizes the contribution of early workshops to gender training in other agencies.¹

Gender training, 1981-84

As gender issues became more visible during the 1970s, some agencies began to offer training on women in development. These early efforts, none held at the Bank, simply documented women's roles. At the Bank, the WID advisor asked trainers at the Economic Development Institute for advice on providing training for Bank staff. She was referred to a Harvard Business School professor who used the method of teaching with case studies, but who had no gender experience. A team including the professor and three specialists on gender issues was put together to run a series of seminars adapted to Bank staff.

Between December 1981 and April 1984, 114 Bank staff participated in five women in

development workshops (see Annex Table 3.1). Given the limited resources available to the WID advisor at the time, this was a significant effort, which had an unexpected impact. The two-day residential workshops established a prototype that many development agencies would use for several years.

One of the trainers describes the Bank's contribution to gender training succinctly: "With putting together gender and the case method we moved from telling people what to do to asking: Given this information, what should planners do?" The workshops had innovative characteristics: they adapted the case study method to gender training, and they developed an analytical framework for gender analysis.

Central to the workshops was the use of case teaching rather than lecture. Harvard Business School had developed the case method as a pedagogical device for putting their graduate students in a situation requiring them to analyze and make judgments about business opportunities, problems, and decisions. Teaching-type cases do this by providing participants with a straightforward, objective, factual presentation about elements to be considered in making a business decision: the situation, business objectives, resources, and other considerations that influence action. For

ANNEX TABLE 3.1: STAFF PARTICIPATION IN 1981–84 WOMEN IN DEVELOPMENT TRAINING COURSES

Categories/dates	12/81	6/82	1/83	6/83	4/84	Totals
Total	37	18	24	21	14	114
Male	23	7	11	11	9	61
Female ^a	11	10	13	10	5	49
Central unit	11	7	10	6	4	38
Africa	8	4	5	6	2	25
Asia	9	1	2	3	3	18
Middle East and North Africa	2	4	1	1	2	10
Latin America and the Caribbean	4	2	2	4	0	12
Operations Evaluation Department	2		1	1		4
Economic Development Institute	0				1	1
Other	1		3		2	6

a. On basis of first names, a few are not known.

development cases, material includes information about the location of a project together with project objectives and resources and any other information that might be relevant in project analysis. The task for the participants is to analyze the material and make proposals about how a project should be designed or what further information is required. The case leader or facilitator asks questions based on this material to elicit analysis and discussion of the situation. Skills and comprehension come from participants' own analyses of the information and problem solving, not from a lecture.

At the Bank, eight projects where attention to women's roles had or should have had an effect on project design and implementation were identified. Case studies were written up from project files specifically for the workshops.² Study questions and the planning assignment exercises at the end of the workshop were written from a World Bank perspective. But the cases were too long and detailed, even after editing. Subsequent workshops employed fewer cases to leave more time for discussion. In addition, two

background papers discussed technical issues in rural development and the urban sector, the other two focused on issues in project design.

To provide Bank project staff with a framework they could use to analyze the roles of women and men in a project area, the trainers reviewed Bank documents to identify the variables relevant to project outcomes on women. Starting from a first list of over 200 variables, the trainers and the WID advisor elaborated an analytic framework that is still valid today:

- *Activity analysis.* Information on the roles of women **and men** with respect to socioeconomic activities namely: the production of goods and services, the reproduction and maintenance of human capital, and social functions (these are activities performed in the community that are part of traditional or political processes). These activities were to be examined according to four parameters: gender and age denomination, activity locus, remuneration form, and technology mode.

- *Access and control analysis.* The socioeconomic factors that underlie each activity, determining who does what, where and why, with particular reference to the access to and control of resources and the benefits associated with those activities.
- *Project cycle.* Understanding the women's dimension in information requirements and design opportunities at each stage of the project cycle.

The percentage of women among the workshop participants (from one-third to more than half) was out of proportion with the percentages of women level 22 and above during these years (11.2 percent for fiscal 1982, 11.8 percent for fiscal 1983, and 12.2 percent for fiscal 1984).³ The high percentage of women at the WID seminars indicates a bias typical of volunteer training programs; those who come are either those already interested or those with responsibility for women-in-development efforts—usually women at the time.

Participants at the first workshop indicated strong pressure to attend from senior management. The number of participants dropped considerably in subsequent workshops, from 37 to a range of 14 to 21. The percentage of part II nationals averaged 39 percent (ranging from 28 percent to 43 percent) in the subsequent workshops versus 32 percent in the first workshop.

Eight people who attended these early training sessions were interviewed. Their memory of the workshop varied greatly: one person still keeps the materials on her desk today and considers them an essential tool to her work, another one had no memory of it at all. In some cases, the participants attended many subsequent gender workshops or have kept up with the literature and therefore find it hard to discern what

was learned from this particular event. Others felt that the workshop was peripheral to their work and have forgotten it. One informant with precise memory stated that the materials and workshop showed convincingly that women and development was a legitimate area of inquiry, but another questioned the quality of the case studies. For most participants, the workshops provided legitimacy to the topic and reduced but did not erase skepticism.

Diffusion of the training model

The training model created at these workshops remains one of the two most widely published models for gender training.⁴ The approach of "asking" rather than telling, and the use of real field data from projects funding by the agency moved gender training a major leap forward. The diffusion to other agencies was both formal and informal, working through three channels: the employment of the Harvard group by other organizations; the publication of their training approach; and the adaptation of their framework and approach by a number of users in different venues.

The Bank's model was first used at a United Nations Development Programme (UNDP) workshop, probably in 1983. There is no written record of the workshop and those interviewed indicated it was not very successful. A second workshop in 1987 used drafts of cases based on UNDP projects. The workshop included one of the original World Bank cases (Kenya Rural Roads), one of the Harvard cases (Indonesia, see below), and the draft based on the Bangladesh tube-well project. Subsequently, the UNDP wrote "Bumpy Roads," a more generic case based on the Kenya Rural Roads case, and used it until recently as a leadoff exercise to acquaint participants with the Harvard

Gender Analysis Framework. A modified gender analysis framework was then used to analyze actual UNDP projects.

Today, gender training at UNDP is coordinated by the training division in liaison with the UNDP gender advisor. Most training is done at overseas offices by the agency's trainer and local gender trainers working together. Gender modules are now included in the orientation training for new staff.

WID staff at the United States Agency for International Development (USAID) had been aware of the first Bank workshops. The Harvard team's unsolicited proposal to prepare gender training materials and conduct a workshop was approved. In late 1982, the Harvard team began working on materials using projects of the USAID (Bank restrictions prevented the use of the original case studies). A revised conceptual framework and nine shorter cases were written. Seven of the cases, the new framework, and three technical papers were subsequently published by Kumarian Press.⁵ A total of six workshops were held for about 200 staff, ending in 1985 after changes in personnel.

In 1985, the Women in Development Office developed a new framework, in checklist size, specifically geared to USAID's project planning cycle. Current efforts have focused on training in overseas missions and have included, in addition to a training course, a portfolio review of the mission's country program and projects.

In 1984, the Harvard team was asked by the Canadian International Development Agency (CIDA) to undertake gender training for all its staff and principal consultants, using the framework and training method used at the Bank. The Harvard team first held two trainers' workshops for CIDA employees and consultants, who could then

share the training responsibilities. As of 1990, CIDA training was being provided primarily by outside consultants. Most overseas offices have a WID officer.

The experience at CIDA has been unusual. First, all staff members, from headquarters and the field, were required to attend gender training, including all senior management. This put all personnel on a common footing with a common set of expectations about how gender issues should be addressed by their agency. Second, staff members were held personally accountable for putting what they learned into action. All program and personnel reviews included attention to whether or not gender analysis was undertaken and how its findings were used in program design and implementation. Third, in Pakistan, staff of the Canadian International Development Agency and government of Pakistan personnel were trained together, mixing staff at all levels of responsibility, for all projects in three sectors.

The agency modified its materials, writing shorter cases, and encouraged a number of Canadian and overseas organizations to use a similar framework. The Canadian Council for International Cooperation and collaborating institutions published a gender training manual in 1991 that includes the Harvard framework and teaching approach along with social analysis. By 1992, about half of professional staff had received some training, most of them in 1985 and 1986. This is quite short of the expected full coverage. Furthermore, CIDA follow-up surveys of workshop participants found few cases of actual use of the techniques learned. The evaluators noted that the training on gender analysis techniques was probably not much used because it had not been presented in the context of the agency's policy and procedures.

In 1984 the Population Council initiated two activities designed to make women's roles visible to development planners. One, the Gender and Agriculture Project, adapted the Harvard framework to questions related to agricultural research and edited seven teaching-type cases that have been published by Kumarian Press. This project followed the model of the Harvard team, including two Training of Trainers workshops, and received considerable assistance from its three members. The materials are used to train agricultural researchers in farming systems research and in international agricultural research. The framework and several of these cases have been translated into Spanish, Portuguese, and French. A second project involved working with Asian research and development organizations to develop cases demonstrating the areas in which attention to women's interests made a difference. These were later turned into teaching cases by their chief editor, with the assistance of two members of the Harvard team. The same consultants conducted a training of trainers in Thailand.

In May 1991, a conference in Bergen, Norway brought together a large number of development staff engaged in gender training. Participants were asked to submit a list of their training materials to a central registry at the University of Illinois.⁶ World Bank cases—the Ulla Ulla case, Kenya Rural Roads, and publications by the Harvard Team—were listed by several organizations, such as African FEMNET, the Coady International Institute, and the National Commission on the Role of Filipino Women. These cases clearly have become part of the training literature.

Bank training activities, 1988-93

Between 1984 and 1988, no Bank training on women in development or gender for World

Bank staff could be identified. From 1988 to 1993, gender training was provided through courses specifically on gender, through the inclusion of gender analysis in other courses, and in some cases through courses on gender at the regional level (see Annex Table 3.2).

Ten Bankwide courses focused on women in development or gender issues, usually within a sector. These one-or two-day courses reached a total of 215 participants. The Africa region held a number of short seminars, with country and sectoral teams and one department held its own gender training. The sector interest has been stronger than country interest. In Asia, two workshops were held, with 42 participants, including one focused on water and sanitation.

Beginning in 1990, at least nine regular, sectoral courses included an explicit gender component. They reached 397 participants (including 213 for the Thirteenth Agricultural Symposium). The environmental assessment courses included a social analysis component focused on poverty, resettlement, gender, institution building and community participation. These are covered by lecture and some exercises in one half day of a two day course. To facilitate further learning and use of the information, a list of current regulations and Bank resource people on these topics is given to each participant.

All evaluations from training courses run through the Training Division since 1990 were reviewed. The only gender-specific course in 1991 was criticized for its agricultural focus and lack of relevance for other sectors. In 1992, two gender courses were offered, both positively received, although the course with an agricultural focus was criticized as not being completely applicable to Bank practices. The 1991 Asia Division gender course (listed for fiscal 1992) was

ANNEX TABLE 3.2: GENDER-RELATED TRAINING PROGRAMS, FY82-FY93

<i>Date</i>	<i>Course title</i>	<i>Participants</i>	<i>Location</i>
I. Women in development/gender-focused training programs			
December 1981	Women in Development	37	Annapolis, Md
June 1982	Women in Development	18	
January 1983	Women in Development	24	
June 1983	Women in Development	21	
April 1984	Women in Development	14	
May 9-11, 1988	Workshop on Integrating Women Into Development: Human Resources	22	Annapolis, Md
May 11-13, 1988	Workshop on Integrating Women Into Development: Agriculture	18	Annapolis, Md
May 31, 1988	Food Security in Africa	18	
March 28, 1989	Workshop on Food Security Issues Related to Women Producers and Consumers	23	
May 8-9, 1989	Women in Development	29	Annapolis, Md
May 1990	Framework for Gender Analysis (Agriculture)	29	World Bank
May 1991	WID: Gender Analysis Framework for Agriculture	13	World Bank
June 17, 1991	Promising Approaches to Female Education	19	World Bank
March 4, 1993	Women's Health and Safe Motherhood	33	
May 1, 1993	Tapping Women's Contribution to Development: What Works in Agricultural Extension	11	

positively received, with a request for more specifics on the framework.

The evaluations of eight 1990 courses, not specifically on gender, suggested "women" or "user/client perspective" among topics which should be covered. In 1991, four course evaluations identified women or user/client perspective as necessary additions. Interestingly,

in 1990 a suggestion was made that "women" be added as a topic in the course on nutrition for nonnutritionists; in 1991, a single suggestion was made that intrahousehold and socioeconomic analysis be dropped "as we are all very familiar with the topic." In 1992, one course received positive and negative marks on the inclusion of a WID perspective; one received positive reviews and a request

(Annex Table 3.2 continued)

<i>Date</i>	<i>Course title</i>	<i>Participants</i>	<i>Location</i>
II. Training programs run by regional divisions through the Training Department			
November 18, 1991	WID Consultation for Asia Task Managers	26	
February, 17, 1993	WID Consultation Workshop: Participatory Design of Water and Sanitation Projects	16	World Bank
III. Regular World Bank training courses incorporating a gender element (FY90-FY93 only)			
July, 9-12, 1990	Nutrition Programming for Nonnutritionists	21	World Bank
December 18-20, 1990	Seventh Annual Irrigation and Drainage Seminar	61	World Bank
June 17-28, 1991	Professional Development for Education, Educational Finance and Management	28	Stanford University
June 19, 1992	Key Aspects of Legal Department's Work for Support Staff	26	
October 22, 1992	Environmental Assessment for Agricultural Staff; Among the stated objectives is reviewing "social issues relevant to Environmental Assessment such as social impacts of projects, community participation, institutions and capacity-building, resettlement and gender"	18	World Bank
November 12-13, 1992	Environmental Assessment for Transport Staff	18	World Bank
January 6-7, 1993	Thirteenth Agricultural Symposium; One of the explicit objectives was "to discuss women's role in natural resource management"	213	World Bank
May 19, 1993	Environmental Assessment for Industry Staff	14	World Bank
June 28-29, 1993	Environmental Assessment for Energy Staff	16	World Bank

that more on this topic be added; and one received the request that it be added.

The Bank Training Department coordinates the preparation of courses for Bank staff and provides administrative and logistic support. The content and delivery of the courses is determined principally by staff from the regions or central vice presidencies. Accord-

ing to the Training Department coordinator, the demand for gender training has been high since the second half of the 1980s, but responding to the demand has been difficult. The demand has been mostly for practical tools and techniques for analyzing gender issues in a project context. The coordinator felt that courses in the past have not responded to staff felt needs, a problem that

is not confined to the gender program. He particularly supported efforts to integrate gender into the broader framework of poverty or social analysis, as is being done in the environmental assessment courses.

Another issue is that all courses are attended on a voluntary basis. Any pressure to attend would come from a staff's division or department. Participants are mostly junior staff. This leaves open to question the knowledge of senior staff on gender issues and their ability to critically review their colleagues' work in this area.

Several participants in the 1988-93 courses reflected on why WID and gender still was not addressed widely. One view was that the argument for inclusion of WID/gender had yet to be made in World Bank terms, or that the research of the last nine years had made the argument, but it still had not been shared widely across the Bank.⁷ Another view was that the Bank emphasis on the technical rather than the social hindered attention to gender.

During FY94, a comprehensive program for improving staff skills was put into action by the GAP team. One team member coordinates training and information dissemination activities, working with GAP colleagues, the regions, and the training department. In order to provide operations staff with the tools best adapted to their needs, the GAP team is cooperating first with the MNA region to develop regional seminars. Three courses have been held so far. Two were organized in cooperation with the MNA region—Incorporating Gender Objectives in Country Assistance Strategy (May 1994) and Using Participatory Assessment Methods in Gender Planning (a workshop for Maghreb country staff, June 1994). The third, Integrating Gender Objectives into World Bank Economic and Sector Work

and Projects (June 1994), was open to staff Bankwide. Several aspects of the program seem likely to avoid earlier problems. First, the fact of having a coherent program and an experienced trainer should avoid the lack of follow-up of previous workshops. Second, regional seminars, developed in cooperation with the region concerned, should provide staff with information that they can immediately put to use. Third, the proposed best practice tool kits would seem more directly useful to staff than case studies (used in the early 1980s seminars), since these kits are expected to compile research findings and concrete examples of successful operationalization.

Summary of lessons relevant for gender training at the Bank

Though the conceptual framework and workshop program of the earlier World Bank WID training included awareness and skills training, awareness seems to have dominated until recently. One of the flaws in the early World Bank and other institutional gender training was to assume that information, a framework, and the application of reason were sufficient to persuade planners of the necessity and utility of including a gender perspective in their work. Current thinking is that more attention needs to be paid to the organizational context, and that incentives to use these new skills should be built into an organization's incentive structure. Another flaw was the lack of provision for follow-up by either the Training Division, the WID unit, or senior management.

Considerable work by Bank staff has provided additional information on women's roles in terms that the World Bank finds most acceptable. Several interviewees discussed the potential benefit of a wider sharing of "best practices" within the Bank.

Others questioned whether convincing research results were available. They asked how gender could be incorporated in terms appropriate to Bank lending; whether persuasive economic arguments were available for each sector; and whether these arguments would be convincing to the borrowers. These questions may be a form of passive resistance, but they also harbor the possibility that the formulation of the WID/gender argument for wide use by World Bank staff was not yet effective at the time of interviews (November 1993).

The recent increase in attention to participation and to anthropological and sociological perspectives in project development and decision-making provides a hospitable environment for greater inclusion of gender considerations. The Portfolio Management Task Force report emphasizes the need for better analysis during project preparation. This increases the importance of understanding the roles of women and men in the project area, and the likely impacts in terms of project success and effects on intended beneficiaries. Gender is an essential part of any pre-project social assessment.

First and foremost, a successful gender training program requires *a firm commitment from management*. This includes senior management participation in the design of the World Bank's gender policy and training. It includes the participation of senior management in the training courses. It also includes the provision of incentives through program or personnel reviews for using these skills.

Specifics on introducing and performing gender training require *an extensive institutional analysis* by staff experienced in gender training and in Bank thinking and procedures. Such a group should include converts and open-minded skeptics, with representa-

tion from the regions. It should have the strong endorsement (including resources) of senior management.

Considerable research is available from World Bank research and projects for constructing training materials. 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. This may need to be modified by sector or region. As indicated earlier, several of those interviewed felt that 'the right way' to approach women in development or gender for the World Bank had not quite been achieved.

An effective, albeit more gradual, approach would be to integrate a gender perspective into the most popular regular, usually sectoral, training courses, as is currently being done in the environmental assessment courses. The World Bank is also moving toward a more open approach toward the participation of beneficiaries in project development. Here it is essential that gender be considered and that women be included in addition to men. This will require resources for gender experts and sectoral experts to work together to integrate gender comprehensively in the courses being prepared.

Collaboration with the Economic Development Institute on the planned workshops for Bank staff and staff in member countries would facilitate a common approach between World Bank and national governments planners.

Notes

1. This annex is based on a review of documents from the first era of gender training; on training department participant lists, agendas, and evaluation reports, where available; and on interviews with participants and trainers.

2. Bolivia—Ulla Ulla Development Project (C0762-BO/L1510-BO); Bangladesh—Population Project (C0533-BD); Jordan—Education Project (C0285-JO); Kenya—Bura Irrigation Settlement Project (L1304-KE/C0722-KE); Kenya—Rural Access Roads Project (C0651-KE/L1305-KE); Nepal—Community Forestry Development and Training Project (C0812-NE); Nicaragua—Rural Sanitation Project (L1495-NI); and Sri Lanka—Small and Medium Industries Project (C1182-CE).

3. The percentages for all women professionals, level equivalence 18 and above, were 21.1, 22, and 23 percent for each of these years.

4. Gender training has become the preferred term for training on the inclusion of women in development planning. "Gender" is preferred because it focuses on the roles of both women and men, not just women alone. In all gender training, gender refers to the social construction of men's and women's roles as distinguished from sex which refers to biological definition of men and women. There is some variation in how the word 'gender' is used. In the Harvard framework and its World Bank predecessor, the emphasis is on the depiction of men's and women's roles (activities, access to and control of resources and benefits) as they are, how these roles fit with project design and the likely impact of the project on men and women. In the Moser/Development Planning Unit (London)/Institute for Development Studies (Sussex) model and many others, more emphasis is put on the relational aspect of gender, the relations between men and women, with women usually subordinate. Using this definition, planning more explicitly addresses the possibility of improving that subordinate position.

5. First published version of Harvard gender analysis framework and case studies. Catherine Overholt, Mary B. Anderson, Kathleen Cloud, and James E. Austin, editors. 1984. *Gender Roles in Development Projects: A Case Book*. West Hartford, Ct.: Kumarian Press. Technical papers, in addition to the conceptual framework include:

- "Women's Productivity in Agricultural Systems: Considerations for Project Design," Kathleen Cloud.

- "Technology Transfer: Implications for Women," Mary B. Anderson.
- "Small Scale Enterprise and Women," Maryanne Dulansey and James E. Austin.

The cases included are:

- Indonesia: East Java Family Planning, Nutrition and Income Generation Project, by David Pyle.
- Tanzania: The Arusha Planning and Village Development Project, by Liz Wiley.
- Kenya: Egerton College, by Mary B. Anderson.
- Dominican Republic: Program for Development of Micro-Enterprises, by Susan Sawyer and Catherine Overholt.
- Peru: Banco Industrial del Peru, Credit for the Development of Rural Enterprise, by Maria Eugenia Arias, John Ickis, and members of the Research Faculty of the Instituto Centroamericano de Administración (INCAE), Managua, Nicaragua.
- India: Gujarat Irrigation Project, by Dr. C. Gopinath, Dr. A. H. Kolaro, and faculty members of the Indian Institute of Management, Ahmedabad, India.
- Kenya: Kitui District Arid and Semi-Arid Lands Project, by Mary B. Anderson.

6. Cherub Antwi-Nsiah. 1991. "Registry of Gender Training Materials." Prepared for the conference on Gender Training and Development Planning: Learning from Experience. Christian Michelsen Institute, Bergen, Norway, May 13-15, 1991. Mimeo. A subsequent, annotated registry of selected materials, readily available, was prepared in 1993. Cherub Antwi-Nsiah and Kathleen Cloud. 1993. *Annotated Gender Training Bibliography, Volume 1*. Champaign, Ill: University of Illinois, Office of Women in Development.

7. All interviews were conducted in November 1993, six months before approval of the policy paper.

Annex 4: Lessons from experience in selected development agencies

Most development agencies have issued policies and guidelines on gender issues at some time during the study period.¹ Recently, several agencies have assessed progress so far, and the members of the Development Assistance Committee (DAC) jointly evaluated the integration of gender issues into members' assistance, in members' evaluations of their assistance, and in the work of the Development Assistance Committee itself. Policy elements and evaluation findings of relevance for Bank work are summarized below around key issues.²

Most evaluations focused on policy integration into the agencies' programs, not on eventual impact on women in developing countries. One exception is the United States Agency for International Development, which evaluated the impact of its WID program in 1987. The program had been initiated after a 1973 law required attention to gender issues in United States assistance, and a policy paper had been issued in 1982. The evaluation found that both outcomes and impact were improved when the project included appropriate actions to reach women. A good gender analysis during project design was not sufficient; steps had to be taken to remove constraints specific to women, including institutional problems.

Mainstreaming vs. WID-only projects. The same USAID evaluation found that attention to gender in mainstream projects was more effective than either women-only projects, or women's components in larger projects, unless these components were well integrated into the main project objectives. Most DAC members now recommend that gender concerns be integrated into mainstream projects, but retain the flexibility to support women-only projects whenever desirable. The Bank's current policy is similar.

Policy and guidelines. Unlike the Bank, most agencies issued a mandate or policy statement, then developed operational approaches. All members of the Development Assistance Committee have a written mandate based on legislative or ministerial directive, or a policy statement of commitment and objectives. Sweden was the first (1963) and Japan the most recent (1989). Countries with a WID policy include Australia (1984), Canada (1986, revised 1992), Denmark (1992), Finland (1991), United States (1982); at least ten reported action plans. The Netherlands has one of the strongest gender statements, including a quantitative target of 50 percent of bilateral assistance to meet Development Assistance Committee criteria by 1998; it also has the most extensive system of guidance and operational tools, including WID criteria in

project screening, "Gender Impact Studies" in project planning, "Women and Development" profiles, sector papers and country or regional policy plans. Operational guidance is given increasing emphasis in all countries, focusing on alterations in the project cycle (thirteen members reported use of gender analysis tools). Tools used include checklists, pre-feasibility terms of reference (Australia), manuals on integration of WID (United Kingdom, European Economic Community), a "Rapid Gender Analysis Model" (Finland). The Regional Development Bank issued a policy paper or statement in 1985 for the Asia Development Bank and in 1987 for the Inter-American Development Bank. The Africa Development Bank issued a position paper in 1988. The United Nations Food and Agriculture Organization issued a policy paper in 1987, followed by a plan of action in 1989.

Rationale for attention to gender. The present practice is to justify gender-related programs on the basis of efficiency and equity, as the Bank has done for years. But a few agencies are emphasizing the importance of empowering women.

Areas of concentration. Most agencies focus on selected areas, with education, health and nutrition, employment generation, and agriculture and rural development most frequently listed (for example by the Asia and Inter-American Development Banks). Water supply, never listed as a concentration area in World Bank statements, was frequently mentioned by other agencies. Urban concerns, which the Bank stopped including in its areas of concentration after the 1970s, are mentioned by several agencies (including the Asia and Inter-American Development Banks).

Country and sector planning. The Development Assistance Committee evaluation

found that all but two members expect attention to gender to be integrated in sector strategies. But implementation has been difficult. The Canada bilateral agency found that the WID directorate had difficulties influencing country and sector work: only 14 percent of staff thought that WID policy and country strategies had influenced their country programs.

Building up a knowledge base on gender issues. DAC members reported that, despite over two decades on international research and information dissemination, ignorance at the policy and operational levels persists. The case for giving special attention to gender roles and women's situation needs constant reiteration, together with evidence for the added benefits such attention brings with it.

Staff training and incentives. Staff training is being carried out by all but two members (a requirement for all staff in Canada and British agencies). A few agencies organize training for field staff and for partners (NGOs, contractors). Gender is being integrated into general staff training by Canada, Finland, Netherlands, Sweden, and the United States. Most training focuses on awareness of gender issues and methods for gender analysis, but recent efforts provide tools for program planning and implementation in selected sectors.

Resources. DAC members and UN agencies report that inadequate financial and staff resources are a constraint. The proportion of funding used for WID programs is low: over 10 percent for Canadian, Norwegian, and United States funds; less than 10 percent in Australia, Denmark, Finland, Italy, and the United Kingdom. However, the Netherlands plans for 50 percent of bilateral assistance to meet WID criteria, and the European Economic Community, Italy, and the United States had funding targets until 1993. WID

funds are used in Australia, Belgium, Canada, Germany, the Netherlands, and Norway. The evaluation of Canada bilateral assistance found that the initial momentum has waned in recent years, as statements by senior management were not always reflected in budget allocations.

Institutional issues. All agencies have specialized staff working on gender, but the range in relative number and institutional set up is great. About half of Development Assistance Committee members have central WID units where expertise is concentrated. A few were created in the 1970s (Germany, Sweden, United States), but most date from the 1980s. The units provide technical assistance and review projects (in Canada and Italy, units have project approval authority). Forty percent have funds to allocate. Centralized expertise is balanced by staff working in other parts of the agency (Italy, United States); in some cases, gender work is completely decentralized (notably Japan, with no WID unit). Denmark, France, Germany, Netherlands, Sweden, the United Kingdom, and United States have field as well as headquarters staff.

Gender specialists have primary responsibility for implementing policy and project staff are responsible for program implementation in most countries. But incentives or sanctions to ensure attention to gender are lacking, and staff are faced with a large number of complex issues. Twelve donors have coordinating or advisory working groups, some including NGOs and other groups (Austria, Denmark, and Sweden). But implementation remains difficult, and there is concern about 'staff fatigue.' For example, the Canada

bilateral agency found that minimal action was taken as sufficient, and that progress was often measured by effort rather than results.

Except for Belgium and Japan, all members monitor programs and projects for attention to gender (nine have dedicated systems, mostly housed in WID units); evaluation ranges from quarterly (Finland, Ireland) to intermittent. Several members reported attention to gender in agency evaluation guidelines, and most reported it addressed in scopes of work; however, most countries had not developed indicators to assess the improvement of women's status, and gender-disaggregation of monitoring data still is not done routinely by any donor. The Canadian evaluation advises the agency to set targets, develop measurable objectives, and institute monitoring systems and accountability systems to change staff behavior.

Attention to gender in evaluations. DAC member countries also reviewed recent evaluations of their programs and projects. All found attention to gender issues insufficient. The Netherlands found that the best evaluations (in terms of attention to differential effects by gender) were done by a team in which all members paid attention to the gender dimensions of the project, and one gender specialist helped analyze the findings.

Notes

1. See Boxes 2.1 and 3.1 for a listing.
2. This annex provides some examples most relevant to Bank work; it is not a complete review of the topic across development agencies.

Annex 5: Major World Bank publications on gender issues (by year of publication, 1975-94)

- World Bank. *Integrating Women into Development*. Washington, D.C., 1975.
- _____. *Note on Some Activities of the World Bank Related to Women in Industry*. Discussion Paper Series No. WID0001. Washington, D.C.: World Bank, 1978.
- Blayney, Robert G. *El Salvador—Second Urban Project: Impact of Small Scale Enterprise (SSE) Credit Program on Women Entrepreneurs*. Discussion Paper Series No. WID0002. Washington, D.C.: World Bank, 1979.
- Carr, Marilyn. *Women in Rural Senegal: Some Implications of Proposed Integrated Food and Nutrition Interventions*. Discussion Paper Series No. WID0003. Washington, D.C.: World Bank, 1979.
- World Bank. *Recognizing the 'Invisible' Woman in Development: The World Bank's Experience*. Washington, D.C.: World Bank, 1979.
- _____. *Some World Bank Projects and Women in Latin America*. Discussion Paper Series No. WID0004. Washington, D.C.: World Bank, 1979.
- _____. *Some World Bank Projects and Women in Asia*. Discussion Paper Series No. WID0005. Washington, D.C.: World Bank, 1979.
- _____. *Some World Bank Projects and Women in Africa*. Discussion Paper Series No. WID0006. Washington, D.C.: World Bank, 1979.
- Riegelman, Mary Ann. *Upper Volta—The Involvement of Women in Three Bank Projects*. Discussion Paper Series No. WID0008. Washington, D.C.: World Bank, 1980.
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- _____. *Considering Women in Project Design: Some Cultural Perspectives*. Discussion Paper Series No. WID0012. Washington, D.C.: World Bank, 1981.
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- _____. *Nicaragua—Rural Sanitation Project: Case Studies*. Discussion Paper Series No. WID0018. Washington, D.C.: World Bank, 1981.
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- World Bank. *Bangladesh—Women's Components of the Population Project and the Second Population and Family Health Project: Case Studies*. Discussion Paper Series No. WID0024. Washington, D.C.: World Bank, 1982.
- _____. *Bolivia—Ulla Ulla Development Project: Case Studies*. Discussion Paper Series No. WID0021. Washington, D.C.: World Bank, 1982.
- _____. *Brazil—Profile of Women in Rural Northeast*. Discussion Paper Series No. WID0025. Washington, D.C.: World Bank, 1982.
- _____. *Elements of Women's Economic Integration: Project Indicators for the World Bank*. Discussion Paper Series No. WID0020. Washington, D.C.: World Bank, 1982.
- _____. *Kenya—Bura Resettlement Project: Case Studies*. Discussion Paper Series No. WID0022. Washington, D.C.: World Bank, 1982.

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Introductory note

Feedback of evaluation results within the World Bank

Each study by the Bank's independent Operations Evaluation Department is reviewed by the Bank's management before being discussed by a committee of the board of executive directors. Management provides a detailed response to the recommendations outlined in the study. This response is discussed by the committee and, together with a record of actions promised and taken, is recorded in a "policy ledger" accessible to all Bank staff. The Bank's executive directors have requested that all published studies by the Operations Evaluation Department include a record of the management response and a synopsis of the committee's findings.

Management response

1. The OED Review of “Gender Issues in Bank Lending” is a valuable history of how the Bank has responded to the introduction of a new dimension in the development process. The Review is based on careful documentation of the many formal and informal efforts over the years (initiated from both within the Bank and externally) that have laid the groundwork for the recent Operation Policy on “The Gender Dimension of Development” and the supporting Policy Paper presented to the Board by HRO in April of this year.
2. The OED Review draws on a data base of 615 projects—roughly 12 percent of the Bank’s portfolio in the period between 1967 and 1993—that had some gender-related activity. As the report points out, only a small number of these (196) projects has reached completion and was, therefore, available for evaluation. Hence, there is, as yet, little hard evidence to draw upon in terms of project performance.
3. The recommendations do, however, flow logically from OP 4.20, and they provide valuable guidance on how the policy can be operationalized at the country level and integrated into Bank business procedures. It will be critical for OED to continue monitoring the portfolio (a) to track the results of completed projects—to see if clearer conclusions about the relative performance of projects that give attention to gender issues can be derived as a larger pool of completed projects becomes available; and (b) to assess whether OP 4.20 and the recommendations made in this report really make a difference in project quality.
4. Management supports the major OED recommendations.
5. The draft ledger of OED recommendations and areas for follow-up action is outlined below.

OED Ledger
Gender Issues in Bank Lending: An Overview

Major OED Recommendations	Management Response
Country departments and gender staff in Central Vice Presidencies and the Regions should look for opportunities to use the following steps—and test others—whenever gender issues are relevant.	
1. To integrate gender issues into ESW and the portfolio, task managers should ensure that staff or consultants with gender experience are included in working groups during sector work, project preparation and appraisal, thematic supervisions, reviews of the portfolio, or assessments of gender issues at country level, as appropriate.	Agreed. Gender issues are likely to be increasingly addressed in ESW and the portfolio as staff become more convinced of the importance of the issues and knowledge is disseminated through training toolkits. There are a variety of ways to integrate gender issues into ESW and the portfolio implemented by the Regions and the Central Vice Presidencies, including the use of gender specialists. Some Regions (Asia, Africa) have systematically reviewed IEPS, and the Technical Department gender teams are available to carry out follow up support where intervention would have the greatest impact. ECA and MENA have used their central pool WID funds to help the integration process. HRO also provides the support at all stages to selective country departments.
2. To increase member countries' understanding and support, country departments should formally discuss gender-related actions with the Borrowers during country implementation reviews, in special workshops, or in meetings of the consortia of development agencies.	Agreed. Africa has adopted this consultative approach in the context of specific ESW or lending operations. Gender issues and economic adjustment will be a regular item for discussion at biannual SPA fora. In ECA, a plan for dissemination is now a requirement for activities supported under the ECA WID Fund. MENA also plans to discuss gender issues at a future meeting of the Council of Advisers and at a regional seminar for high level country officials. Asia and LAC have also been discussing gender related ESW with concerned borrowers and disseminating the outputs to a wider audience.
3. When planning the preparation of a Country Assistance Strategy paper, country departments should determine what steps—if any—are needed to ensure that the required statement on gender reflects a good understanding of the situation and contributes to the policy discussion with member countries.	Agreed. This is a strategic point of intervention which provides the opportunity for the identification of priorities and the allocation of human and financial resources to be deployed on incorporating the gender perspective into ESW and lending operations where it is relevant to the overall CAS. HRO is reviewing all CAS to ensure that the focus on priorities for gender is reflected. HRO plans to work with three selective country departments in FY95 to mainstream gender issues into the country strategy and the policy discussion with member countries. The Asia gender team plans to work with at least two country departments in FY95 to assist them in determining whether and how gender issues may be appropriately incorporated in the CAS and resultant ESW and lending program. A pilot program was established by the gender team in Africa to conduct systematic gender analysis of the household surveys and to provide models for the gender analysis of poverty assessments and hence eventually for CAS.
4. To monitor implementation and facilitate evaluation of outcomes, member countries and sectoral divisions should select indicators with separate targets for men and women (or boys and girls) when appropriate, and plan data collection accordingly.	Agreed. Africa has adopted a system to monitor a clear specification of gender related objectives or sex-specific objectives at all stages of the project cycle and quantitative specification of indicators for monitorable outcomes in SARs and supervision reports.
5. Innovations to increase the participation of women in development planning and actions, or to better integrate gender issues in social assessments, should be promoted under the Fund for Innovative Approaches in Human and Social Development.	The Fund for Innovative Approaches in Human and Social Development should be used strictly for innovations. With respect to gender, such innovation would primarily include efforts to include gender issues in social assessments and to increase participation of women in development planning and decision-making. Management will take these considerations into account when approving the applications for the Fund.

Joint Audit Committee response

Discussing the study, the Joint Audit Committee of the Bank's Board of Executive Directors commended OED on the overview, and said that until gender issues are mainstreamed into overall Bank activities, the development objectives of the institution will not be achieved. The Committee further indicated that although the stage is finally set, there is still a long way to go in this area.

The Committee noted that a paragraph on gender issues should not be required in country assistance strategies, as experience has shown that this does not yield the desired results. Rather, the Committee said that when a strategy paper is presented to the Board, and there is a strong indication that gender issues are pertinent, executive directors would ask specific questions to assure that the subject is adequately addressed. If gender issues are not reflected to the directors' satisfaction, the relevant region would put forward its rationale for this section and the Board would debate these issues, as required.

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