

DOCUMENT OF THE INTER-AMERICAN DEVELOPMENT BANK

**OPERATIONAL POLICY ON GENDER EQUALITY IN  
DEVELOPMENT**

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## I. INTRODUCTION

- 1.1 Gender equality contributes to poverty reduction and results in higher levels of human capital for future generations. The empirical evidence in this regard is overwhelming: equality within the household, in the labor market, in access to financial services and technology, and in civic and political participation reinforce one another and contribute to the effectiveness of development efforts.<sup>1</sup> Equality between men and women also has intrinsic value, and is firmly supported by the governments of Latin America and the Caribbean. Every one of the Bank's member countries in the region has backed the Universal Declaration of Human Rights (1948), the Convention on the Elimination of All Forms of Discrimination against Women or CEDAW (1979), the Inter-American Convention on the Prevention, Punishment, and Eradication of Violence against Women (1994), the Programme of Action of the International Conference on Population and Development (1994), the Platform for Action of the Fourth World Conference on Women (1995), and the Millennium Development Goals (2000).
- 1.2 In 1987, the Bank approved its Operational Policy on Women in Development (OP-761), recognizing that the advancement of women was a priority development goal and undertaking to support the member countries in their efforts to achieve greater integration of women in all stages of the development process and to improve their socioeconomic status. At the time it was approved, this Policy provided the necessary guidance for the Bank to begin its work in this area and supported the member countries' efforts in this regard.
- 1.3 The progress made in implementing Operational Policy OP-761 in recent years has been reflected mainly in an increase in the number and quality of Bank operations incorporating gender issues and in portfolio innovation, through projects that specifically address new gender issues. Overall, the Bank has made the greatest strides in its social sector investments and microenterprise support. At the same time, it has encountered challenges to progress in addressing gender issues in the design of projects supporting infrastructure, economic opportunities and competitiveness, and institutional capacity of the State; and in the execution and evaluation of the gender elements included in projects.<sup>2</sup>
- 1.4 More than two decades into its implementation, Operational Policy OP-761 needed to be updated in order to enhance the Bank's contribution to equality between men and women in Latin America and the Caribbean. This new Policy takes into account the Bank's experience supporting the integration of women as leaders, participants, and beneficiaries in development; reflects gains in the region in terms of the status of women and gender equality, as well as emerging challenges;

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<sup>1</sup> World Bank, 2007. Global Monitoring Report 2007: Confronting the Challenges of Gender Equality and Fragile States.

<sup>2</sup> Reports to the Board of Executive Directors on the Implementation of the Bank's Women in Development Policy. The most recent of these reports spanned the period 2002-2005 (document GN-2249-1). <http://idbdocs.iadb.org/wsdocs/getdocument.aspx?docnum=975142>

integrates a gender perspective that seeks equal conditions and opportunities for women and men to reach their social, economic, political, and cultural potential; and sets out specific mechanisms for ensuring effective implementation of the Policy and the evaluation of its results. This Operational Policy on Gender Equality in Development replaces Operational Policy OP-761.

## II. SCOPE

- 2.1 This Policy applies to the Inter-American Development Bank and the Multilateral Investment Fund and covers the Bank's country strategies as well as its development interventions via its financial operations in the public and private sector (sovereign and non-sovereign guaranteed), technical-cooperation operations including operational inputs, and knowledge and institutional capacity-building products.

## III. OBJECTIVES

- 3.1 The objective of the Policy is to strengthen the Bank's response to the goals and commitments of its member countries in Latin America and the Caribbean to promote gender equality and the empowerment of women. By strengthening its response, the Bank expects to contribute to meeting international agreements on the topic of this Policy.<sup>3</sup> Moreover, the actions in fulfillment of this Policy will help to further the Bank's institutional priorities and its mission to accelerate economic and social development in its regional member countries.

## IV. POLICY DIRECTIVES

- 4.1 This Policy identifies two lines of action: (i) proactive action, which actively promotes gender equality and the empowerment of women through all the Bank's development interventions; and (ii) preventive action, which introduces safeguards to prevent or mitigate adverse impacts on women or men due to gender resulting from the Bank's actions through its financial operations.
- 4.2 For purposes of this Policy, *gender equality*<sup>4</sup> means that women and men enjoy the same conditions and opportunities to exercise their rights and reach their social, economic, political, and cultural potential. The Policy recognizes that the pursuit of equality requires actions aimed at *equity*, which implies providing and distributing benefits and/or resources in a way that narrows the existing gaps, while recognizing that these gaps can harm both women and men. The *empowerment of women* is

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<sup>3</sup> Including the Millennium Development Goals, goal 3 of which is to promote gender equality and the empowerment of women.

<sup>4</sup> The term *gender* refers to the behavioral characteristics and roles that are socially attributed to women and men in a given historical, cultural, and socioeconomic context, beyond their biological differences, and that help shape the responsibilities, opportunities, and barriers encountered by women and men.

understood to mean expanding the rights, resources, and capacity of women to make decisions and act independently in social, economic, and political spheres.

**A. Proactive action**

- 4.3 This Policy distinguishes between two facets of proactive action: (i) direct investment in areas strategic to gender equality, and (ii) mainstreaming the gender perspective in development interventions.
- 4.4 For both facets, the Bank will support specific actions aimed at: (i) addressing the specific needs of both women and men, recognizing that, because of gender differences, women and men enjoy different advantages and face different barriers to participating in and benefiting from development; and (ii) investment in the empowerment of women as a key factor in accelerating progress toward gender equality, recognizing that inequality affects women to a larger extent.
- 4.5 The Policy recognizes that gender inequalities interact with other inequalities that are based on socioeconomic, ethnic, and racial factors, exacerbating the barriers and vulnerabilities of poor, indigenous, and Afro-descendant women. For this reason, the Bank will pay particular attention to these groups.<sup>5</sup>

**1. Direct investment in gender equality**

- 4.6 The Bank will support its borrowing member countries in identifying financial operations whose primary objectives are to address strategic gender issues, generate knowledge to enhance value added in this area, and build institutional capacity. In this effort, the Bank will also identify regional operations that add value and respond to specific gender issues in regional or subregional groups of countries.
- 4.7 The Bank will conduct studies on specific gender issues to promote this subject in dialogue between the Bank and the borrowing countries. If gender is included as a specific priority area for the Bank and government in the respective country strategy, the analysis performed will inform the programming process in order to identify interventions for direct investment.
- 4.8 Direct investment will emphasize innovation, the development of good practices, and impact evaluation in addressing gender issues. The Bank will set priorities for direct investment, depending on the development intervention, as follows:
- a. **Financial operations and technical-cooperation operations for operational inputs.** The Bank will give priority to direct investment in areas with a significant impact on gender equality and the empowerment of women, including equality in the labor market, addressing gaps in education that are increasingly affecting men, caring for persons (children, the ill, the disabled, or dependent older adults), social security reform, participation and leadership

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<sup>5</sup> The Policy recognizes that the situation of Afro-descendants may be different in countries where they constitute the majority population group.

of women in decision-making, promotion of reproductive health, at-risk youth, and prevention of gender-based violence.

- b. **Technical-cooperation operations for knowledge and capacity-building products.** The Bank will promote generating the necessary information and analysis to support direct investment, test innovative proposals, or evaluate potentially successful interventions with a view to supporting evidence-based policy measures for gender equality. It will also promote collecting statistical information and analysis aimed at examining the barriers to and opportunities for progress toward gender equality and the empowerment of women. Lastly, the Bank will promote building the institutional capacity of public and private stakeholders to promote gender equality.

## 2. Mainstreaming of gender equality

- 4.9 The Bank will actively seek opportunities to mainstream the gender perspective as a strategic dimension of its development interventions and will incorporate actions to address this issue.
- 4.10 For the purposes of this Policy, *gender mainstreaming* is the process that seeks to have gender equality and the needs of women and men be heard and addressed in the design, implementation, monitoring, and evaluation of the Bank's interventions, with special emphasis on public- and private-sector loan operations, given their importance within the institution.<sup>6</sup>
- 4.11 To promote equal access to and the effective delivery of project benefits, the Bank will take into account the analytical and operational implications of the following considerations, among others:
  - a. The human life cycle, which entails recognizing the barriers to gender equality and the specific needs of young girls and boys, adolescent girls and boys, adult women and men, and older women and men. It also requires timing interventions so as to foster successful transitions between the various life stages, to prevent an accumulation of gender inequalities and poverty over the course of people's lives.
  - b. The diversity of households and family structures, which requires particular attention to domestic partners, female-headed households, single-person households formed by older adults, and the presence of secondary families formed by single parents within extended households.
  - c. Gender differences in the use of time, meaning that participation in and enjoyment of project benefits may be affected by the unequal amount of time devoted by women and men to domestic chores, caring for persons, studies or personal development, economic activities, civic responsibilities, and rest and recreation.

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<sup>6</sup> When relevant, this can include *affirmative action* measures, i.e. temporary actions aimed at equalizing historical disadvantages.

- d. Motherhood and fatherhood, requiring projects to be adapted to the specific needs of fathers and mothers in terms of access to project benefits and to encourage responsible parenthood and equal participation in child-care duties.
  - e. The factors widening gender gaps and exclusions, which require analysis of the interaction between gender and, among other things, socioeconomic level, race or ethnic origin, geographic area, migratory status, forced displacement, sexual orientation, physical or mental disability, or HIV/AIDS status.
  - f. The productive roles of women, which need to be factored into the design of activities to expand economic opportunities, including activities to raise productivity and enhance competitiveness.
  - g. Inequalities in terms of decision-making capacity and the exercise of power, usually in favor of men, which entails supporting women's access to decision-making in the public and private spheres, to ensure their full participation and leadership in development.
- 4.12 The Bank will seek out opportunities to include gender issues in sector studies that support the preparation of country strategies. If gender is included in the analysis of a specific priority area for the Bank and government in the respective country strategy, the analysis will inform the programming process in order to identify interventions to promote gender equality through sector investment.
- 4.13 **Application of mainstreaming.** Gender equality mainstreaming will be applied systematically in all Bank development interventions. The Bank will require an analysis of its interventions' potential contribution to gender equality. When the analysis so indicates, the Bank will incorporate specific actions to strengthen that contribution. Mainstreaming will take specific forms, depending on the development intervention in question:
- a. **Financial operations and technical-cooperation operations for operational inputs.** The Bank will require an analysis of the relevance of gender issues during preparation of its operations. Where the analysis so indicates, it will ensure that concrete actions to address priority issues and measures to facilitate implementation are incorporated.
  - b. **Technical-cooperation operations for knowledge and capacity-building products.** The Bank will promote gender analysis in its analytical production overall, including relevant macroeconomic and sector studies. It will promote building institutional capacity, including that of government institutions, the private sector, and civil society, in order to boost the analysis and mainstreaming of gender in policies and programs.
- B. Preventive action**
- 4.14 The Bank will conduct its financial operations so as to identify and address adverse impacts and the risk of gender-based exclusion, include women and men in consultation processes, and comply with applicable legislation relating to equality between men and women. Its financial operations must, throughout all phases of the project cycle, adhere to the safeguards set forth in this Policy.



- 4.15 **Adverse impacts.** In designing its operations, the Bank will introduce measures to prevent, avoid, or mitigate any adverse impacts and/or risks of gender-based exclusion identified in the project risk analysis. These risks may include:
- a. Introducing unequal requirements for access to project-derived economic opportunities and benefits, including paid work, training, credit, or business opportunities. Projects will apply the principles of nondiscrimination, equal treatment, and equal pay for equal work.
  - b. Disregarding the right of women to inherit and own land, homes, and other assets or natural resources. The Bank will recognize women's ownership rights regardless of marital status and will adopt measures to facilitate their access to the documents they need to exercise this right.
  - c. Introducing unpaid work unevenly. Where appropriate for the implementation of a project, volunteer work or community contributions will be organized to provide the conditions for equitable participation of men and women in the identified tasks.
  - d. Introducing conditions that restrict the participation of women or men in project activities and benefits based on pregnancy, maternity/paternity leave, or marital status. The Bank will take care that these conditions do not limit the access of women or men, as the case may be, to project participation and benefits.
  - e. Increasing the risk of gender-based violence, including sexual exploitation or human trafficking, and sexually transmitted diseases, including HIV/AIDS. Where such risks are identified, the Bank will support measures such as: communication and awareness campaigns, development of community prevention plans, health services, codes of ethics, and surveillance systems.
- 4.16 **Consultation and effective participation of women and men.** In its public consultation processes, the Bank will seek the equitable participation of women and men, as well as the participation of civil society organizations. In project-related consultations, the Bank will seek the inclusion of the women and men affected in a gender-sensitive and socio-culturally appropriate manner.
- 4.17 **Women's rights.** The Bank will recognize, in any cultural or ethnic context, the right to equality between women and men, as well as the specific rights of women, as established in the national legislation of the regional member countries and in applicable international agreements.
- 4.18 Under this Policy, the Bank's support of affirmative action specifically targeted to women or men with the goal of closing existing gender gaps, meeting specific gender-based needs of either group, or ensuring the participation of either group in consultations will not constitute discrimination or exclusion.
- 4.19 **Application of safeguards and risk analysis.** The Bank will assess operations' potential adverse impacts on gender equality beginning in the initial stage of preparation. If impacts of this nature are identified, the Bank will incorporate a gender analysis into its social impact and risk assessments. Where the analysis so

indicates, the Bank will include measures in a timely manner to prevent or mitigate these impacts in the risk management plans and will monitor those measures.

## V. IMPLEMENTATION AND COMPLIANCE

- 5.1 **Management for results.** The Bank will require indicators that help to measure progress in implementing this Policy. The main indicators to be used are: (i) indicators on gender equality that will be set out in the results matrix of country strategies that have identified gender equality as a priority area and in financial and technical-cooperation operations for operational inputs or knowledge and capacity-building products that have identified gender equality as a relevant issue; (ii) measurement of whether the Bank's involvement adds value to a project's development impact through its contribution to gender equality, which will be recorded in projects' Development Effectiveness Matrix;<sup>7</sup> and (iii) disaggregation by sex of project beneficiaries, which will be required in those operations that record information on the beneficiary population. In addition, the Bank will require indicators that measure the Bank's added contribution to regional objectives and its corporate effectiveness to be sex-disaggregated.<sup>8</sup>
- 5.2 **Implementation guidelines.** The Bank will develop guidelines to facilitate implementation of the Policy directives. Moreover, these will guide the integration of gender issues into projects and will offer criteria for determining the risk of negative impacts or gender-based exclusion in the Bank's operations. Moreover, with a view to strengthening the analytic and operational capacity of Bank staff on gender issues, the Bank will develop sector notes on gender that promote use in development interventions of the knowledge and lessons learned on gender issues.
- 5.3 **Action plans.** The Bank will develop periodic action plans, including a results framework, in order to ensure that the Policy is applied and to measure progress and results.<sup>9</sup> All divisions and units responsible for the operations and activities covered by this Policy will take part in developing the plans. These plans will define priority areas of action and specific targets to be met each period.
- 5.4 **Consistency with other safeguard policies.** The Bank will apply this Policy in a manner consistent with its safeguard policies. These include the Disclosure of Information Policy (OP-102), the Operational Policy on Indigenous Peoples (OP-765), the Environment and Safeguards Compliance Policy (OP-703), and the Operational Policy on Involuntary Resettlement (OP-710), as well as other safeguard policies that the Bank may consider in the future. This Policy will be included in the Independent Consultation and Investigation Mechanism.

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<sup>7</sup> This measurement will be included in the section on additionality in the Development Effectiveness Matrix (DEM), which measures the evaluability of operations.

<sup>8</sup> At the date of approval of this Policy, this measurement is laid out in the IDB Results Framework 2012-2015, Annex I of the Report on the Ninth General Increase in Resources (document AB-2764).

<sup>9</sup> The first of these plans will be finalized before this Policy takes effect.

- 5.5 **External consultation.** With a view to promoting progress in implementing the Policy, the Bank will foster dialogue with national mechanisms for advancing gender equality and empowering women in the borrowing countries and with other multilateral development agencies and bilateral donors.
- 5.6 **Corporate responsibility.** The Bank's commitment to gender equality in its technical and financial support for the region should also be reflected in the promotion of gender equality, diversity, and work-family balance in the Bank's human resource management and in its institutional environment.
- 5.7 **Entry into force.** This Policy will take effect six months after its approval by the Bank's Board of Executive Directors. It will apply to financial and technical-cooperation operations including operational inputs and knowledge and capacity-building products that enter the Bank's operations program after the entry into force of the Policy and to country strategy documents that have not been started as of that date.<sup>10</sup>

## VI. POLICY MONITORING

- 6.1 **Indicators.** The Bank will develop two types of indicators for monitoring the Policy: (i) indicators that measure the Bank's effort to comply with the Policy;<sup>11</sup> and (ii) indicators for measuring fulfillment of the targets in the action plan for each period; these will be set forth in the results framework of the action plans.
- 6.2 **Reports.** The Bank will track and monitor the gains made and report on progress in implementing the Policy and action plans through the following reports:
- a. Management will report to the Board of Executive Directors on execution and attainment of the objectives of the Policy and its action plans, every three years after the Policy takes effect. The reports will be made available to the public on the Bank's website.
  - b. The Bank will report on the Policy's monitoring indicators in the annual report that reviews the Bank's corporate performance on managing for development results.<sup>12</sup>
  - c. The Policy's monitoring indicators will be incorporated into the reports that enable Management to monitor attainment of the outputs related to corporate results.<sup>13</sup>

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<sup>10</sup> The Policy will apply to the reformulation of previously approved operations that require approval by the Board of Executive Directors of the Bank.

<sup>11</sup> Annex I includes a list of the indicators that have been identified preliminarily.

<sup>12</sup> At the date of approval of this Policy, this report is the Development Effectiveness Overview (DEO).

<sup>13</sup> At the date of approval of this Policy, these reports are the quarterly and annual business reviews.

## **Monitoring indicators for the Policy**

The Bank will systematically compile data for the following indicators related to the Policy's two main directives:<sup>1</sup>

### **1. Indicators of proactive action for gender equality:**

- a. Country strategies that include gender-related results in their results matrix (number and percentage).
- b. Financial operations that invest directly in gender equality and the empowerment of women (number, percentage, and amount)
- c. Financial operations that include gender-related results in their results matrix (number, percentage, and amount, by sector)
- d. Operational inputs that include gender-related results (directly or mainstreamed) in their results matrix (number, percentage, and amount, by sector)
- e. Knowledge and capacity-building products that include gender-related results (directly or mainstreamed) in their results matrix (number, percentage, and amount, by sector)

### **2. Indicators of preventive action for gender equality:**

- a. Loan operations that identify potential adverse gender impacts and include prevention or mitigation measures (number and percentage)

### **3. Indicators for monitoring project results:**

- a. Project monitoring reports and loan results reports for lending operations that include specific gender-related results in their results matrix (number and percentage)
- b. Project monitoring reports that disaggregate project beneficiaries by sex (number and percentage)
- c. Project completion reports (or expanded performance monitoring report) for financial operations that invest directly in gender equality that report satisfactory results for actions to foster gender equality in operations that invest directly in gender equality (number and percentage, by sector)
- d. Project completion reports for operations that include specific gender-related results in their results matrix that report satisfactory results for actions to foster gender equality (number and percentage, by sector).

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<sup>1</sup> The selected indicators make it possible to monitor all of the Bank's development instruments through existing measurement systems, but should not be considered exclusive. The Bank can revise the proposed indicators to improve measurement of its progress in executing the Policy. Moreover, it can add new indicators in its monitoring reports.