



## Sector and Thematic Evaluation

# Evaluation of the Bank's Support for Gender and Diversity



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Office of Evaluation and Oversight (OVE)  
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ACRONYMS AND ABBREVIATIONS

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EXECUTIVE SUMMARY

<b>1. INTRODUCTION .....</b>	<b>1</b>
A. Evaluation objective, scope, and methodology .....	1
B. Gender and diversity in LAC .....	3
<b>2. THE BANK’S FRAMEWORK FOR SUPPORTING GENDER AND DIVERSITY .....</b>	<b>7</b>
A. The Bank’s approach .....	7
1. Approach to gender .....	7
2. Approach to diversity .....	11
B. The Bank’s organizational setup for integrating gender and diversity .....	11
C. Summary .....	13
<b>3. THE EXTENT OF ACTIVITIES TO SUPPORT GENDER AND DIVERSITY .....</b>	<b>15</b>
A. Portfolio overview .....	16
B. Extent of activities that mainstream gender .....	19
1. Trends in the level and thematic relevance of activities .....	19
2. Relative degree of integration of gender in the lending portfolio .....	23
C. Extent of activities that integrate diversity .....	29
1. Trends in the level and thematic relevance of activities .....	29
2. Relative degree of integration of diversity in the lending portfolio .....	32
D. Summary .....	36
<b>4. FACTORS AFFECTING THE LEVEL AND DEGREE OF MAINSTREAMING .....</b>	<b>39</b>
A. External factors .....	39
B. Internal factors .....	40
1. Leadership/political commitment .....	42
2. Technical capacity .....	42
3. Embedding gender and diversity in business practices .....	43
4. Resource allocation .....	45
5. Accountability and monitoring systems .....	45
<b>5. CONCLUSIONS AND RECOMMENDATIONS .....</b>	<b>47</b>

NOTES

REFERENCES AND BIBLIOGRAPHY

Available at [www.iadb.org/evaluation](http://www.iadb.org/evaluation)

ANNEX I [Methodology for GD Portfolio Identification and Classification](#)

ANNEX II [Examples from Field Studies](#)

ANNEX III [Good Practices for Promoting Gender Equality through MDB Operations](#)

ANNEX IV [Gender and Diversity Survey](#)

# ACRONYMS AND ABBREVIATIONS

CRF	Corporate Results Framework
CS	Country strategy
CSD	Climate Change and Sustainable Development Sector
DDR	Diversity-disaggregated result
DEM	Development Effectiveness Matrix
DRR	Diversity-related result
EDGE	Economic Dividends for Gender Equality
ENE	Energy Division
GAD	Gender and Development
GAP	Gender Action Plan
GD	Gender and diversity
GDI	Gender and Diversity Division
GDR	Gender-disaggregated result
GPS	General Perceptions Survey
GRR	Gender-related result
HUD	Housing and Urban Development Division
IDB	Inter-American Development Bank
IE	Impact evaluation
IIC	Inter-American Investment Corporation
INE	Infrastructure and Energy Sector
LAC	Latin America and the Caribbean
M&E	Monitoring and evaluation
MDB	Multilateral development bank
MIF	Multilateral Investment Fund
MSME	Micro, small, and medium enterprises
NSG	Non-sovereign-guaranteed
OMJ	Opportunities for the Majority
OVE	Office of Evaluation and Oversight
PEU	Project executing unit
PCR	Project Completion Report
PMR	Project Monitoring Report
RES	Research Division
RND	Environment, Rural Development & Disaster Risk Management Division
SCF	Structured and Corporate Finance Department
SFD	Sector Framework Document
SG	Sovereign-guaranteed
SPD	Office of Strategic Planning and Development Effectiveness
SPH	Social Protection and Health Division
TC	Technical cooperation
TERCE	Third Regional Comparative and Explanatory Study
TSP	Transport Division
VAW	Violence against women
weB	Women entrepreneurship Banking
WID	Women in Development
WSA	Water and Sanitation Division

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The IDB strives to strengthen its response to the goals and commitments of the region to promote gender equality, women's empowerment, and development with identity of indigenous peoples and African descendants.  
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# Executive Summary

**Despite progress in reducing poverty, Latin America and the Caribbean (LAC) remains the most unequal region in the world, with gender and ethnicity being important factors of inequality. Women, indigenous people, and African descendants face the most economic inequality, discrimination, and lack of representation in the region. The Bank has recognized that increasing equality of opportunity across gender, ethnic, and racial groups provides social and economic benefits, and therefore it has increased its efforts to address these challenges. As several policies and strategic documents of the Inter-American Development Bank (IDB, or the Bank) have set out, the Bank strives to strengthen its response to the goals and commitments of the region to promote gender equality, women's empowerment, and development with identity of indigenous peoples and African descendants. The policies call on the Bank to take proactive actions in the form of direct investment and mainstreaming in its country strategies (CSs), loans, technical cooperation (TC), knowledge products, and outreach efforts, as well as reactive actions to prevent harm in these populations.**

In this context, the IDB's Board of Executive Directors requested that the Office of Evaluation and Oversight (OVE) evaluate the Bank's work related to gender equality, women's empowerment, and development with identity. The main objective of the evaluation is to assess the Bank's policy framework, its institutional setup, and the extent of its activities to promote gender equality, women's empowerment, and

development with identity (OVE is currently assessing the implementation of gender and indigenous peoples safeguards in a separate evaluation). This evaluation focuses on three key aspects: (i) the relevance of the Bank's approach (its policy framework and the implementation of that framework) to promoting gender equality, women's empowerment, and development with identity; (ii) the extent of its activities to support gender and diversity; and (iii) the institutional factors that influence these activities. It is challenging to measure the effectiveness of mainstreaming gender and diversity; indeed, the Bank has yet to measure it adequately. Therefore, the evaluation is unable to determine how well the Bank's activities have promoted gender and diversity. This evaluation examines the Bank's experience in promoting gender and diversity beginning in 2011, the last year covered in OVE's evaluation of the strategy for indigenous development and the year the most recent gender policy went into effect.

The Bank's strategic framework for addressing gender is more detailed than that for addressing diversity, and has become more focused since the approval of the gender policy. The Bank has developed three Gender Action Plans (GAPs) with results frameworks focused on measuring the Bank's effort. Each successive GAP has reflected a more focused approach at the sector level. Aside from the Indigenous Policy, diversity has only the Sector Framework Document (SFD), which does not provide a results framework.

The Gender and Diversity Division (GDI) plays the primary role in promoting the Bank's support for gender and diversity. GDI works annually with each sector division to determine which loan operations in the pipeline have the potential to mainstream gender. This effort assists in meeting the Bankwide target, set out in the GAP, for percentage of loans that include gender-related results indicators. GDI also makes available staff and consultants to work with the divisions in incorporating gender in the operations. Although GDI also has staff and consultants who are available to support diversity operations, it does not conduct a similar exercise that reviews the pipeline of operations to determine which have the potential to mainstream diversity. GDI is also responsible for developing a relatively small portfolio of loans and TCs that directly invest in gender and diversity. Finally, GDI conducts its own research, collaborates with other divisions, and organizes policy dialogues and outreach activities in the region to further develop and disseminate knowledge related to gender and diversity.

The efforts to strengthen the Bank's response to the region's goals and commitments to promote gender and diversity are represented in a growing portfolio of interventions that mainstream gender and diversity, especially loans in gender and TCs in diversity. Although the volume of direct investments was small and relatively even over the evaluation period, the growing volume of loans that have mainstreamed gender

suggests a relatively higher appetite among borrowing countries to work with the IDB in addressing gender challenges, as well as the Bank's increased capacity in this area. The localized nature of diversity challenges makes them more difficult to tackle, especially given limited information on particular ethnic/racial communities and national political sensitivities.

In 2016, loans and TCs mainstreaming gender accounted for 48% and 4% of total approvals, respectively, up from 23% and 2% in 2011. The Bank approved relatively more loans mainstreaming gender than TCs. OVE found that the content of the operations supporting gender was mostly aligned with regional and country challenges—for example, efforts to improve women's economic empowerment and health outcomes, and to a lesser extent to address violence against women and improve women's voice and agency. In addition, an increasing number of CSs have included gender: 18 countries' most recent CSs include gender diagnostics, indicators, or both, and 7 have gender as a cross-cutting issue. During the evaluation period, the Bank also produced 35 gender-related technical notes and guides to facilitate the incorporation of gender in its operations, and 67 studies (economic and sector work, working papers, discussion papers, and books) included gender issues. The Bank has also increased the number of policy dialogues it conducts and strategic partnerships it has built in the region that include gender issues.

Individual lending operations that mainstreamed gender have increased not only in number, but also in the degree to which they integrated gender. This trend reflects the improved capacity of Bank sector divisions and their recognition of the relevance of integrating gender. The Bank's corporate indicators that measure the integration of gender focus primarily on the number of activities, rather than the qualitative aspects of those activities. Therefore, OVE classified the gender and diversity portfolio and assessed the degree to which operations included gender in four components of project design: objectives or sub-objectives, diagnostics, activities, and results indicators. The relative degree that gender is integrated in an operation is related positively to the number of components that incorporate gender. For example, those that include gender elements in all four components, or in all but the objective or sub-objectives, have a relatively high degree of integration. Using this classification, OVE determined that over time, more sectors, including Infrastructure and Energy, and Climate Change and Sustainable Development, have been integrating gender with a relatively higher degree.

The number of loans, TCs, and CSs that address diversity also increased during the evaluation period, focusing more on development with identity for indigenous peoples than for African descendants. The share of Bank approvals that included some diversity element grew from 4% of loans and 1% of TCs in 2011 to 16% and 7%, respectively, in 2016. OVE concluded that the loan operations were relevant





The Bank has made significant progress in increasing its capacity to supply operations that mainstream gender and diversity but must strengthen its systems for accountability and monitoring the results of this portfolio.

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to the local challenges, focusing on expanding indigenous communities' access to infrastructure and services—especially water and sanitation, and energy—and on their human capital development, mainly in the form of health and education. Only 6 countries include diversity diagnostics or indicators in their current CSs, while 11 include diversity as a cross-cutting theme. Compared to gender, the Bank has focused relatively less on generating knowledge products related to diversity and has conducted relatively few policy dialogues and built fewer strategic partnerships.

The degree to which the average loan integrated diversity also grew over time, although the increase was not as pronounced as that for gender. OVE found that the number of operations that include diversity-related objectives or sub-objectives has increased, though most of the growth in the diversity portfolio is due to an increase in operations that include diversity in the results indicators. The staff OVE interviewed and surveyed stated that, compared to gender, they have received less training and have a lower level of skills to address diversity in their operations. The increase in the relative degree of integration of diversity may be more related to implementation of the indigenous safeguards policy. For example, there has also been an increase in the number of operations that include consultations with indigenous communities, which is a requirement of the safeguards policy.





For the Bank to support gender and diversity in its development interventions it must rely on demand from its country counterparts. Team leaders OVE interviewed and surveyed, as well as the opinions expressed in the Bank's General Perceptions Survey, noted that despite the Bank's efforts to promote gender and diversity, it is still difficult to convince many governments to include these issues in their lending portfolio. They further noted, and the lending patterns confirm, that countries that are convinced of the importance of including gender and diversity in their lending portfolio are more interested in working with the IDB in addressing gender than diversity. This is likely because gender is a factor in all countries in the region, while diversity challenges are concentrated in fewer countries.

Simultaneously, several internal factors have positively influenced the levels of the Bank's support for gender and diversity and their relative degree of integration. First, the Bank's management has prioritized support for gender and has set clear targets for the inclusion of gender in the operational portfolio. Further, although progress is uneven, Bank specialists in many divisions have noted that they have improved their capacity to mainstream gender through experience, training, and working with GDI specialists and gender consultants. At the same time, the Bank has embedded gender into its business practices by focusing on improving the gender balance in its staff and management—an approach that, according to the

literature, enhances the ability of development institutions to promote gender in their operations. Finally, the allocation of resources for hiring gender specialists and consultants and for financing initiatives in some sector divisions to build capacity has fostered deeper integration of gender in operations. In contrast, the Bank has had more challenges in incorporating diversity in its operational portfolio.

Despite the increase in the number of operations mainstreaming gender and diversity and their relative degree of integration, the Bank systems for accountability and monitoring do not adequately follow implementation and measure the results of this portfolio. In general, the Bank's incentives for supporting gender and diversity focus on activities and outputs, such as the inclusion of gender and diversity indicators in project results frameworks or the number of regional policy dialogues, and not on the achievement of outcomes to improve gender equality or development with identity. Further, most of the operations that mainstream gender and diversity do so in the form of relatively small activities that are not necessarily aligned with the operation's primary objectives and that do not always have outcome indicators to measure their effectiveness. This factor, combined with the fact that few operations in the portfolio under review have closed and have completed project completion reports, limits the number of operations in the gender and diversity portfolio whose effectiveness OVE can measure. As a result, it remains challenging to measure the effectiveness of the Bank's overall support for gender and diversity. This difficulty is not unique to the IDB; other multilateral development bank evaluation offices have also noted this challenge.

Moving forward, it will be important for the Bank to consolidate its capacity for integrating gender and diversity and demonstrate sufficient evidence of the development effectiveness of these activities. The internal and external factors affecting the level and degree of integration of gender and diversity can also be viewed as the determinants of the supply and demand for mainstreaming. On one hand, the Bank has made significant progress in increasing its capacity to supply operations that mainstream gender and diversity. On the other hand, the demand for these operations depends on the borrowing countries' determination that doing so will improve development outcomes.

**Drawing on the findings of this evaluation, OVE has the following recommendations for the IDB's continuing support for gender and diversity:**

- 1. Increase the evidence base on the effectiveness of support for gender and diversity, particularly at the operational level, by ensuring there are adequate incentives for team leaders to monitor implementation and evaluate results.** The GAP and SFD have been good instruments to understand gender and diversity gaps better and to narrow the focus of priority areas for the Bank's lines of action in gender and diversity. While the Bank has

generated some evidence in its knowledge products and recently completed operations, it is important for the Bank to further strengthen its knowledge at the operational level on what works in the prioritized areas.

- 2. Continue to deepen the dialogue with borrowing countries in these priority areas, drawing on the knowledge accumulated in the Bank and other development institutions.** A strong dialogue that draws on reliable evidence will help to increase the number of operations that mainstream gender and diversity and the degree and effectiveness with which they do so.
- 3. Together with the Board, take a fresh look at how and to what extent the Bank should continue to support diversity in its operations.** The Bank has tended to prioritize gender over diversity in recent years, and renewed discussion on the Bank's approach to diversity is warranted. This discussion should consider the Bank's comparative advantage and evidence on the relative effectiveness and the benefits and costs of various approaches to date. It should also consider whether the scope of the Bank's current approach to diversity -- development with identity for indigenous peoples and African descendants -- is adequate or should be expanded to include other types of diversity, such as sexual orientation and persons with disabilities.





Women, indigenous people and African descendants face the most economic inequality, discrimination, and lack of representation in the region.  
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# 1 Introduction

## A. EVALUATION OBJECTIVE, SCOPE, AND METHODOLOGY

**Despite progress in reducing poverty, Latin America and the Caribbean (LAC) remains the most unequal region in the world, with gender, race, and ethnicity being important factors of inequality.**

Women, indigenous people, and African descendants face the most economic inequality, discrimination, and lack of representation in the region (although the challenges they confront differ in nature and complexity) (Barros et al. 2011). The Inter-American Development Bank (IDB, or the Bank) has recognized that increasing equality of opportunity across gender, ethnic, and racial groups provides social and economic benefits, and therefore it has increased its efforts to address these challenges. As several policies and strategic documents have set out, the Bank strives to strengthen its response to the goals and commitments of the region to promote gender equality, women's empowerment, and the development with identity of indigenous peoples and African descendants. To achieve this objective, the policies call on the Bank to take proactive actions in the form of direct investment and mainstreaming<sup>1</sup> in its country strategies (CSs), loans, technical cooperation (TC), knowledge products, and outreach efforts, as well as reactive actions to prevent harm to these populations.<sup>2</sup>

In this context, the IDB's Board of Executive Directors requested that the Office of Evaluation and Oversight (OVE) evaluate the Bank's work related to gender equality, women's empowerment, and development with identity. The main objective of the evaluation is to assess the extent to which the Bank's activities to date have promoted gender equality, women's empowerment, and development with identity.<sup>3</sup> (OVE is currently assessing the implementation of gender and indigenous people's safeguards in a separate evaluation.) This evaluation focuses on three key questions: (i) how relevant is the Bank's approach—its policy framework, the implementation of that framework, and the associated activities—to promoting gender equality, women's empowerment,

and development with identity; (ii) to what extent have the Bank’s activities supported gender and diversity; and (ii) what institutional factors influence direct investment and mainstreaming in Bank activities? This evaluation, OVE’s first examining gender and diversity together, focuses on the Bank’s strategic approach and activities, not the effectiveness of its interventions, which it is too early to assess.

The evaluation examines the Bank’s experience in promoting gender and diversity beginning in 2011, the year the most recent gender policy went into effect and the last year covered in OVE’s evaluation of the strategy for indigenous development. To answer the evaluation questions, OVE analyzed a portfolio of all IDB projects approved between 2011-2016 that were identified as potentially supporting gender and diversity (see Box 1.1).<sup>4</sup> In addition, OVE conducted a series of interviews with IDB staff and management involved with these issues, a survey of project team leaders (see [Annex IV](#)), and a review of relevant Bank policies and strategic documents. To gather further information on project relevance and implementation, OVE conducted field visits in four countries,<sup>5</sup> which included interviews with project execution unit staff and beneficiaries and visits to project sites. Finally, to help assess the internal factors influencing Bank support, OVE reviewed the relevant literature and conducted a comparative analysis of the IDB’s approach and those of other multilateral development banks (MDBs) (see [Annex III](#)).

### *Box 1.1 Methodology*

#### **Evaluation Questions**

**(i) Relevance and  
(ii) Extent of Gender  
and Diversity  
Integration**

#### **Methodology and Sources of Information**

##### **IDB Strategic documents:**

Operational Policies, Gender Action Plans, Sector Framework Documents, Agreements for the 8<sup>th</sup> and 9<sup>th</sup> General Capital Increases, Institutional Strategy, and Corporate Results Framework.

##### **Portfolio of IDB loans and TCs:**

OVE built and analyzed a database of all IDB and MIF loans and TCs approved between 2011 and 2016 with gender and diversity elements using the following sources: Enterprise Data Warehouse, Project documents, Project Monitoring Reports, and Project Completion Reports. In January 2016 all IDB Group private sector operations were merged into the Inter-American Investment Corporation (IIC). Although it does not fall under the scope of the evaluation, OVE included IIC loans approved in 2016 to give continuity to the analysis of operations supporting the private sector.

##### **Field Studies:**

OVE conducted field studies in Bolivia, Jamaica, Nicaragua, and Uruguay to assess the relevance of operations and to gather preliminary evidence on project implementation and effectiveness. OVE selected these countries using the following criteria: (i) a mix of countries with relatively high and low gender equality; (ii) countries with relatively high engagement in gender; (iii) a mix of countries with relatively high and low ranking in the Council of the Americas Ethno-Racial Indicator of the Social Inclusion Index; (iv) inclusion of one country from each of the IDB’s four country departments; (v) take advantage of synergies with other OVE evaluations.

Evaluation Questions	Methodology and Sources of Information
(iii) Factors Influencing Bank Support:	<p><b>Bank-generated data:</b> Enterprise Data Warehouse, Data from DEM project ratings, 2016 General Perceptions Survey.</p> <p><b>Stakeholders' views:</b> The perception of the Bank's institutional capacity to mainstream gender and diversity was gathered through the following sources: <i>Survey:</i> The survey was answered by 119 out of 215 employees from Vice-Presidency for Sectors (55% response rate) who had been team leaders during the preparation and/or execution of loan operations between 2011 and 2016. <i>Focus group:</i> 1 focus group comprising of 9 IDB gender and diversity champions. <i>Interviews:</i> Sector Managers, Division Chiefs, and VPS staff with gender and diversity responsibilities representing 15 sector divisions. Also, Interviews with the Executive Vice President, the Vice President for Countries, IDB professional staff, government representatives, personnel of project executing units, and direct beneficiaries of Bank projects.</p> <p><b>Literature review:</b> OVE reviewed Bank documents relating to gender and diversity, OVE evaluations, theoretical and empirical literature on the themes.</p>

## B. GENDER AND DIVERSITY IN LAC

Increasing equality of opportunity across gender, ethnic, and racial groups provides social and economic benefits. Gender equality is fundamental to whether and how societies thrive (World Economic Forum 2015). For instance, empirical evidence has shown that better employment opportunities for women contribute to increased profitability and productivity (IFC 2016). The economic benefits of gender equality are particularly high in rapidly aging societies, as boosting women's labor force participation could help offset the impact of a shrinking workforce (IMF 2016). Moreover, the issues women advocate and invest in have wide-ranging societal implications. For example, studies have shown that female members of legislative bodies are more likely to focus on issues such as gender-based violence, health, and education, while being more responsive to citizen needs and cooperating across party and ethnic lines (OECD 2014). Although data on the economic benefits of increasing equality of opportunity across ethnic and racial groups are scarcer, reducing gaps in health and education and other factors that affect productivity would be positive for a country's economic growth (World Bank 2015).

Some progress in leveling the playing field for different groups can be observed in the region, especially on gender issues, but key challenges remain. LAC has advanced significantly in the so-called "first-generation" issues, such as equal access to education. It was the first region in the developing world to achieve gender parity in primary and secondary education; indeed, on average, women achieve higher levels of education than men.<sup>6</sup> However, "second-generation" challenges remain in many areas. In terms

of economic gaps, higher levels of education have not translated into better labor market outcomes. The IDB estimates that average female labor force participation in the region is 68% compared to 95% for males (IDB 2017a).<sup>7</sup> Moreover, women in the region earn on average 60%-75% of men's wages, and they tend to work in lower-productivity sectors, with 54% working in the informal sector (World Bank Gender Data Portal).<sup>8</sup> Even though LAC has one of world's highest rates of female entrepreneurship, women-owned businesses in LAC are concentrated in sectors with low productivity and are less profitable than those owned by men (Global Entrepreneurship Research Association 2017).<sup>9</sup> Thus, for every 100 men living in poor households in the region, there are 117 women.<sup>10</sup> In terms of health gaps, most countries in LAC rank high in gender equality of indicators such as life expectancy. However, although the maternity mortality rate has been reduced, the region still has not met the Millennium Development Goal of a 75% reduction.<sup>11</sup> Furthermore, the rate of teen pregnancy in LAC is 84 out of every 1000 girls aged 15 to 19 years—20 points higher than the world average—exposing girls to health, economic, and social risks (IDB 2017a and Restrepo-Méndez et al. 2015).

Other “second-generation” challenges associated with gender inequality are women's limited voice and agency and the high prevalence of violence against women (VAW). Women in LAC are generally less represented in their communities' decision-making process. For example, women hold only around 10% of municipality leadership posts, less than 25% of local council seats, and 25% of seats in congress (UN). Furthermore, women are systematically underrepresented in leadership positions in the public and private sectors.<sup>12</sup> Of the 25 countries with the highest rates of femicide, more than half are in LAC (Nowak 2012). Globally, one in three women experiences physical and/or sexual violence in her lifetime, but the rate is as high as 40% in some countries in LAC (WHO 2013). Violence against women and girls in the region is seriously underreported; and when it is reported through formal channels, offenders are hardly ever convicted (Carvalho 2016).

Like women, indigenous peoples and African descendants continue to suffer from unequal development of human capital because of their lack of access to, and the low quality of, public services.<sup>13</sup> Indigenous peoples and African descendants are the largest diverse groups in the region, together accounting for approximately 30% of the population.<sup>14</sup> The health outcomes for indigenous and African-descendant people in LAC are significantly and consistently worse than those of the rest of the population.<sup>15</sup> For example, an indigenous child has a 70% higher risk of dying before the age of five than a non-indigenous child.<sup>16</sup> At the same time, indigenous children have lower access to, and receive lower quality of, education than their non-indigenous peers, even when controlling for socioeconomic level and urban-rural typologies.<sup>17</sup> Furthermore, standardized tests like TERCE<sup>18</sup> reveal an important gap (15%) between indigenous and non-indigenous children in the learning achievements of mathematics and language (UNESCO 2016). African descendants obtain university degrees at half the regional rate, despite relative parity in primary and secondary education attainment.<sup>19</sup>



These educational gaps help explain the poor labor market outcomes for these groups: it is estimated that they earn up to 40% less per hour than their non-indigenous/non-African-descendant peers in countries for which race- and ethnicity-disaggregated data are available (Ñopo 2012). Consequently, poverty levels are much higher across these groups.<sup>20</sup> In countries with available data, poverty rates among African descendants are at least 1.5 times higher than among the non-indigenous/non-African-descendant population; moreover, poverty afflicts 43% of indigenous households in the region, more than double the poverty rate of non-indigenous households, with 9% living in extreme poverty (World Bank 2015).

Indigenous communities face further challenges related to access to basic services (including finance, mainly due to land ownership structures) and the preservation of their cultures. Gaps remain between indigenous and non-indigenous communities in access to infrastructure such as water and electricity, largely because of geographic isolation. At the extreme, in Panama the gap is almost 30% for access to water and over 50% for electricity (IDB 2017a). The last 30 years have seen significant progress in the recognition of the land rights of indigenous communities in the region. However, in most cases government responsibilities are transferred to the indigenous communities without budgetary resources or not within appropriate community governance structures (Van Dam 2011). The result is that indigenous people are less likely to hold property titles than other rural dwellers across LAC (Patrinos and Skoufias 2007).

In addition, given the diversity of cultures, addressing the challenges facing indigenous communities is complex. LAC has 826 different groups of officially recognized indigenous peoples, each with its own culture, and knowledge of what is effective in leveling the playing field for one group does not necessarily apply to others. Therefore, tackling these inequalities adds a layer of complexity not present when addressing gender inequality and increases the difficulty of promoting overall equality between indigenous and non-indigenous populations. Furthermore, the intersection of gender and ethnicity deepens some of these inequalities, creating additional challenges for marginalized populations to reap the benefits of economic progress.





# 2 The Bank's Framework for Supporting Gender and Diversity

## A. THE BANK'S APPROACH

The Bank's approach to gender and diversity has evolved over time, in line with the approaches taken by the wider development community. With respect to gender, the Bank has followed the development community's shifts in approaches since the 1980s (see Box 2.1 and Figure 2.1). The Bank's approach to development with identity for indigenous peoples has taken into account the importance of respecting local culture and autonomy, while preventing and mitigating harm through its development activities.

### 1. Approach to gender

In 1987, the Bank's Board of Directors approved the Operational Policy on Women in Development (OP-761).<sup>21</sup> The Policy was consistent with the approach taken by the development community, known as Women in Development (WID), which was based on the premise that international development efforts had traditionally neglected to reach women, and special, targeted efforts were required to ensure that women benefitted from development projects and programs. OP-761 remained the Bank's fundamental policy throughout the 1980s and 1990s, and established the Bank's commitment to addressing women's needs and priorities in its operations. Other Bank strategies—for example, the Eighth Replenishment Mandates of 1994 and the Institutional Strategy of 1999—reinforced and expanded the Bank's commitments under OP-761.

#### *Box 2.1. Evolution in the development community's approaches to gender*

Approach	Description
Women in Development (WID)	The WID approach analyzed women's status in the formal and productive economic development spheres. Policy solutions and interventions thus focused on direct investments to increase women's access to employment, markets, education, and other material resources. The assumption was that eliminating women's economic inequalities would increase their status and power in other spheres (United Nations Development Programme).

Source: OVE, based on European Institute for Gender Equality.

Approach	Description
<b>Gender and Development (GAD)</b>	The GAD approach took a more holistic view by looking at the social construct of gender and its impact on the roles and responsibilities expected from men and women. This approach challenged the existing social, political, and economic structures and institutions, viewing women as a diverse category and not a homogenous group. One of the major strategies that came out of this line of thinking was gender mainstreaming.
<b>Dual approach (WID+GAD)</b>	The dual approach refers to complementarity between gender mainstreaming and specific gender equality policies and measures. It is also referred to as the twin-track strategy.

In 2003, the Bank updated its approach to gender through the Gender Mainstreaming Action Plan (2003-2005), which sought to facilitate greater attention to gender as a cross-cutting issue in all Bank activities. The plan, which was aligned with the development community's shift toward a Gender and Development (GAD) approach, included the commitments of all operations divisions and relevant departments of the Bank to develop actions to improve equality between men and women, as well as a collaborative commitment between different members of the institution, including the high levels of the Administration. It prioritized the incorporation of gender analysis and actions throughout the project cycle from the initial consultation and project preparation to project execution, monitoring, and evaluation. This approach still influences the current framework for setting targets for gender mainstreaming in loans and CSs.

**FIGURE 2.1** Evolution of gender policies and strategies in MDBs



Source: OVE, based on MDBs' institutional documents.



In 2010, OP-761 was updated and renamed the Operational Policy on Gender Equality in Development (GN-2531-10); it represents the current outline for IDB projects regarding gender equality. With this policy, IDB became the first of the MDBs to combine elements of the WID and GAD approaches into a dual approach that commits the Bank to undertake proactive actions in the form of gender mainstreaming and direct investment. The policy also introduces a commitment to preventive actions in the form of gender safeguards. It does not include a set of specific results indicators but calls for periodic Gender Action Plans (GAPs) to provide more specific actions the Bank could implement to promote gender equality. The updated GN-2531-10 was preceded by the 2009 creation of the Gender and Diversity Fund, which provided US\$16 million to support gender and diversity mainstreaming in operations.<sup>22</sup>

Since 2010, the Bank's strategic framework for addressing gender has become more detailed and focused. The Bank has prepared and implemented two GAPs (2011-2013 and 2014-2016) and has recently prepared a third (2017-2019). Each GAP has included a results framework focused on measuring the Bank's effort in supporting gender. For example, the latest GAP (2017-2019) sets targets for certain activities: the percentage of CSs approved that include gender-related results indicators (GRRs), analysis of gender issues, and policy actions to address them (65%); the number of regional policy dialogues and high-level meetings with public and private sector stakeholders that include a focus on gender equality issues (16); and the percentage of sovereign-guaranteed (SG) loans approved that have GRRs in the project result matrix at entry (50%).

While targets can motivate staff to promote gender, it is not clear how the Bank set them. For example, the Bank recognizes that country demand is an important determinant of its programming; however, OVE did not find much evidence that it was taken into consideration when setting targets for indicators such as the percentage of loans that include GRRs. At the same time, most indicators measure the Bank's effort to mainstream gender in its activities, but not the results of these activities.

Each successive GAP has demonstrated an approach that is more focused on supporting gender and on priority areas in the sector divisions. Unlike the first GAP (2011-2012), the last two GAPs emphasize identifying the lines of action where the Bank's work on gender mainstreaming should have a more strategic focus. In the Infrastructure and Energy Sector, for example, detailed priorities include strengthening women's skills and opportunities to access nontraditional jobs in infrastructure sectors and the provision of effective and safe urban transport services. The GAPs have also increasingly identified priorities that require a multisectoral approach, with collaboration across the Bank's sector divisions. These include work to strengthen women's skills and access to quality jobs in the fields of science, technology, engineering, and math; to prevent violence and provide quality response services to VAW survivors; and to reduce the high rate of teen pregnancy.



GDI plays the lead role in promoting gender and diversity in the Bank. It has a relatively small loan portfolio but plays an important role supporting other divisions that mainstream gender and diversity in their loans.

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The current GAP (2017-2019) presents updated strategic lines of action within the Bank's sectors that reflect how the various sector framework documents (SFDs) have been integrating gender and what experience the sector divisions have gained in mainstreaming gender in their operational portfolios. This latest GAP maintains the principal areas of action of the previous GAP, while also addressing the challenges identified in the 2014-2016 Progress Report.<sup>23</sup> It commits the Bank to deepen its efforts to "(i) expand the inclusion of gender issues and gender-related results in country strategies; (ii) improve the quality of gender mainstreaming in lending operations, (iii) document the achievement of results during project execution and completion; and (iv) disseminate knowledge to key stakeholders that makes the case for addressing gender equality issues across a range of sectors." Although the results matrix sets targets that are more ambitious than those in the previous GAP, the indicators focus on outputs and do not measure the outcomes or impacts that result from these outputs.

The Gender and Diversity SFD complements the GAP, providing a diagnosis of key challenges and identifying general lines of action for the Bank to pursue regarding gender. The SFD, approved by Management in 2015 and updated in 2017, is related to but distinct from the two operational policies noted above. It emphasizes the importance of mainstreaming gender and diversity in operations, proposing for gender three lines of action that are of a more general nature than those in

the GAP, and for diversity three that are based on key challenges identified by the Bank.<sup>24</sup> Other strategic documents that complement the SFD include the Bank's *Strategy on Social Policy for Equity and Productivity* (GN-2588-4),<sup>25</sup> the *Update to the Institutional Strategy 2016-2020* (AB-3008),<sup>26</sup> and the *Corporate Results Framework 2016-2019*.<sup>27</sup>

## 2. Approach to diversity

Until the Eighth Replenishment (AB-1704) in 1994, the Bank's support for indigenous peoples was limited to mitigating or preventing the adverse impacts of its operations. The Eighth Replenishment mandate gave the Bank a proactive role in promoting development among indigenous peoples in the context of reducing poverty and enhancing social equity. In 2001, the Bank approved *The Action Plan for Combating Social Exclusion due to Race or Ethnic Background* (CS-3362), which further promoted development among indigenous peoples while also introducing a focus on the region's African descendants.<sup>28</sup> The Action Plan also focused on increasing diversity within the Bank's staff.

In 2006, the Bank formalized its approach for supporting indigenous peoples with the establishment of OP-765, the Operational Policy on Indigenous Peoples (GN-2386-8). The purpose of the policy, which also applies to the IDB and the Multilateral Investment Fund (MIF), is to enhance the Bank's contribution to indigenous peoples' development with identity. GN-2386-8 is a binding document that defines the long-term objectives and conditions for implementation of Bank activities related to indigenous peoples. Its guidelines focus on (i) supporting indigenous peoples' development with identity by mainstreaming indigenous issues in general operations and through direct investments; and (ii) establishing safeguards to prevent or minimize exclusion and adverse impacts of Bank-financed operations. The policy's guidelines do not provide results indicators, although the policy asserts that the Bank "will set out verifiable indicators of compliance with it and of its effectiveness."<sup>29</sup>

Since GN-2386-8 was approved, the approach has not evolved much. The Gender and Diversity SFD complemented the policy by deepening the diagnostics and developing lines of activities, while also addressing African descendants. However, unlike for gender, specific action plans for diversity have not been developed.

## B. THE BANK'S ORGANIZATIONAL SETUP FOR INTEGRATING GENDER AND DIVERSITY

The Bank's Gender and Diversity Division (GDI) is responsible for promoting gender equality and diversity through policy and strategic guidance, as well as technical assistance and training programs. Before 2007, the Bank had two units directing support for gender and diversity: the Women in Development Unit and



the Indigenous Peoples and Community Development Unit. In 2007, as part of the IDB's realignment, these two units were merged into GDI. The division consists of 16 staff and 5 full-time contractual employees, 4 of whom work in country offices. Although the division roster does not distinguish staff as gender or diversity specialists, relatively few work on diversity issues. GDI also hires consultants, on a regular basis, to work directly on its operations and knowledge products.

GDI is responsible for the preparation of loans, TCs, and knowledge products that focus directly on gender and diversity. The target set in the GAP (2017-2019) for loans that directly invest in gender equality increased from two in the previous GAP to four. GDI's direct investment loans have been primarily in support of the *Ciudad Mujer* model of integrated services for women. It also co-led seven operations with other divisions during the evaluation period, mostly in the areas of citizen security and sustainable tourism. GDI also develops TCs and knowledge products to deepen the Bank's understanding of the region's gender and diversity challenges, and it supports the inclusion of gender and diversity in regional policy dialogues and other outreach activities to disseminate knowledge and experience. Some of these activities are independent efforts of GDI and some are joint with other divisions.

Aside from its own activities, GDI collaborates with other Bank divisions to promote the mainstreaming of gender and diversity in their activities. GDI works annually with each sector division to determine which loans in the pipeline have the potential to mainstream gender. This effort assists in meeting the Bankwide target set in the GAP for percentage of SG loans that include gender-related results indicators and the percentage strategically aligned with gender and diversity, currently 50% and 40%, respectively. However, GDI does not conduct a similar review of the pipeline of operations to determine which have the potential to mainstream diversity.

GDI also has specialists and consultants available to work with other departments to incorporate gender and diversity in their activities. For example, in many instances GDI specialists or gender and diversity consultants participate as members of project teams led by other divisions. In addition, GDI leads or collaborates in the development of gender and diversity diagnostic assessments for CSs and loans. It also has developed technical notes and toolkits to provide guidance for sector divisions on how they can mainstream gender in their operations.

The Bank's sector divisions also have gender focal points, who assist in implementing the commitments presented in the GAP. The focal points are part of an Inter-Departmental Gender Policy Working Group that GDI chairs. The responsibilities of the working group include reviewing the pipeline for projects with the potential to mainstream gender and facilitating the exchange of experience and lessons learned.

## C. SUMMARY

The Bank's approach to promoting gender has been consistent with that of the wider development community, and its framework has recently become more focused. The Bank's approach was consistent with the development community's evolution from WID to GAD to the dual approach. Since 2010, the Bank has produced three GAPs, which have reflected a more focused approach at the sector level while including results frameworks to measure and incentivize the efforts to mainstream gender in development interventions. Nevertheless, it is not clear how the Bank set its targets and whether they reflect demand from borrowing countries. Further, the results indicators mostly measure the number of activities the Bank does, rather than the results of these activities.

The Bank's approach to diversity has received less emphasis. In contrast to gender, the Bank has not prepared diversity action plans or results frameworks with targets to promote the integration of diversity in its development interventions. Since 2006, the only strategic document the Bank has developed with respect to diversity is the SFD.

GDI plays the lead role in promoting gender and diversity in the Bank. While GDI has a relatively small loan portfolio, it plays an important role supporting other divisions that mainstream gender and diversity in their loans. GDI also produces TCs and knowledge products to better understand the challenges facing the region. As the Bank has increased its efforts to promote gender, sector divisions have assigned gender focal points, who assist in implementing the GAP commitments.



The share of total loan and TC approvals that had gender elements doubled between 2011 and 2016, when the Bank approved 344 loans and 64 TCs with gender elements. Similarly, the share of Bank approvals that included some diversity element grew considerably during the same period while the Bank approved 15 loans and 118 TCs with diversity elements.



# 3 The Extent of Activities to Support Gender and Diversity

**The Bank's efforts to support gender and diversity can be measured by the number of activities that mainstream these issues, especially loans and TCs; however, it is a challenge to identify such a portfolio. The Bank does not have a single, clearly defined gender and diversity portfolio of loans and TCs that is consistent over the evaluation's 2011-2016 timeframe.<sup>30</sup> Therefore, OVE conducted a portfolio identification<sup>31</sup> and review (the "GD portfolio") to assess the extent to which IDB loan and TC operations have mainstreamed gender and diversity.<sup>32</sup> The GD portfolio includes SG and non-sovereign-guaranteed (NSG) loans.<sup>33</sup>**

OVE conducted a desk review of the GD portfolio, (i) classifying each operation into gender and diversity themes relevant in the region according to the gaps outlined by the existing literature (including the Gender and Diversity SFD), and (ii) assessing the extent to which the design of each operation mainstreamed gender and diversity. To assess the extent of mainstreaming in individual operations, OVE identified the elements of vertical logic in which gender and diversity were present (i.e., gender or diversity objectives/sub-objectives, diagnoses, activities, and indicators) and determined whether they were interrelated. OVE then developed a concept it calls "relative degree of integration" based on the number of interrelated elements it identified. For example, operations with relatively a high degree of integration are those that include interrelated gender and/or diversity diagnoses, activities, indicators, and/or objectives/sub-objectives, while operations with a relatively low degree of integration are those that include only gender and/or diversity indicators and/or activities. OVE built these categories to describe the extent that gender and diversity were mainstreamed in operations, but not to determine the overall quality of the operation. In other words, operations with a relatively high degree of integration should not be viewed as necessarily being of higher quality than those with a relatively low degree of integration. [Annex I](#) provides methodological details.

## A. PORTFOLIO OVERVIEW

Gender and diversity elements are present in a significant and growing share of the Bank's approved loans and TCs (Figure 3.1). The share of loan and TC approvals that included gender elements roughly doubled since 2011: loans increased from 23% in 2011 to 48% in 2016,<sup>34</sup> and TCs increased from 2% to 4% during the same period. The share of loans and TCs that included diversity elements also increased during the evaluation period: loans increased from 4% of approvals in 2011 to 16% in 2016,<sup>35</sup> and TCs increased from 1% in 2011 to 7% in 2016. Between 2011 and 2016 the IDB approved at least 428 loans and 287 TC operations with some gender or diversity element (Table 3.1). On average, at least 42% of all loans and 10% of all TC operations approved in 2011-2016 included some gender or diversity element at design (i.e., approval documents had at least one objective, sub-objective, diagnosis, activity, or indicator for monitoring and evaluation (M&E) related to gender or diversity).

**FIGURE 3.1**  
Share of GD loans approved  
(% of total SG and NSG  
loan approvals)

Source: OVE, based on Data Warehouse.

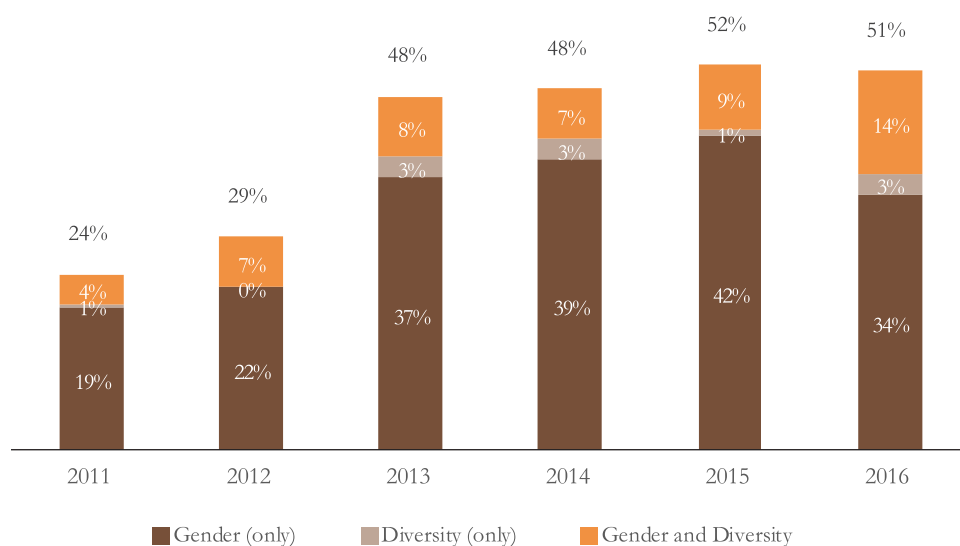


TABLE 3.1. GD PORTFOLIO SNAPSHOT, 2011-2016

	Gender only	Diversity only	Gender and Diversity
<b>SG loans</b>	221 (30% of SG)	13 (2% of SG)	74 (10% of SG)
<b>NSG loans</b>	123 (38% of NSG)	2 (1% of NSG)	5 (2% of NSG)
<b>TCs</b>	64 (3% of TC)	118 (5% of TC)	27 (1% of TC)
<b>MIF</b>	34 (6% of MIF)	34 (6% of MIF)	10 (2% of MIF)

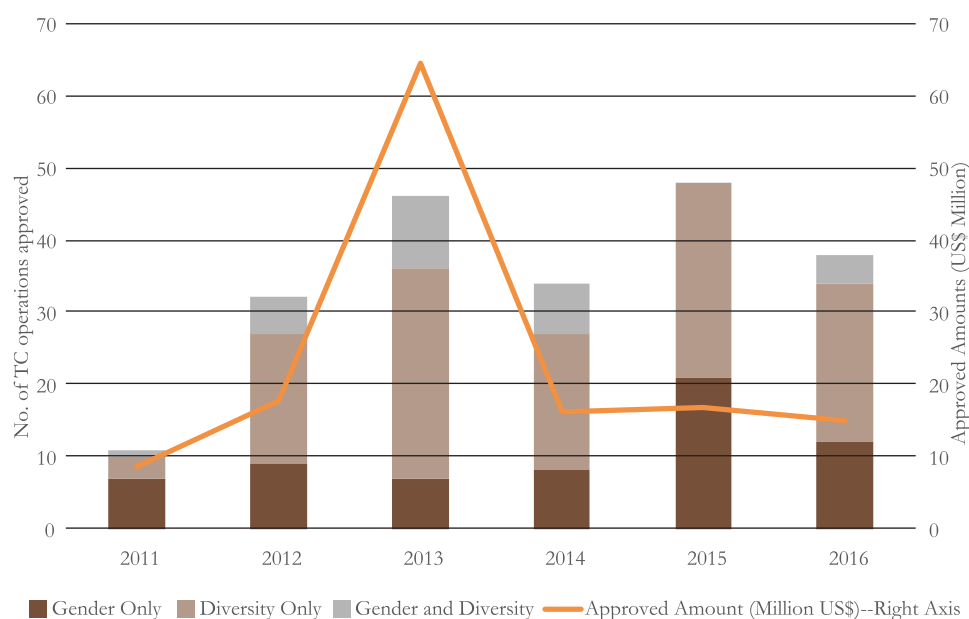
Note: Because gender and diversity are cross-cutting issues usually materialized in activities, indicators, or outputs, OVE focuses on the number of operations, as the volume of operations is not representative of the Bank's use of resources in these areas. SG approvals include investment grants.

Source: OVE, based on Data Warehouse.

During the evaluation period, gender issues were mostly supported with lending, while diversity matters were primarily addressed through TCs (Table 3.1). The Bank focused much more on gender than on diversity in loans: for every approval with some diversity element, there were roughly four with some gender element. This may be indicative of borrowing countries' relative interest in gender over diversity. For NSG operations this trend was especially marked. However, the Bank approved roughly two TC operations with diversity elements for every operation with gender elements. MIF approvals were balanced between gender and diversity.

Aside from a small, though emblematic, direct investment portfolio of loans led by GDI, the Bank has extensively supported gender and diversity through mainstreaming. The Bank's approach to gender and diversity combines specific direct investment operations<sup>36</sup> with mainstreaming. *Ciudad Mujer* has been a gender flagship program for GDI, with the first model in El Salvador (2011 and 2015), and a second operation approved for Honduras in 2016. GDI also co-led seven operations with other Bank units during the evaluation period, mostly in the areas of citizen security and sustainable tourism. This said, the core of the GD portfolio mainstreams gender and diversity by integrating these themes in the different elements of operation design.

TC operations (Figure 3.2) complemented gender and diversity loans, and were often leveraged to address challenges across multiple countries. During the evaluation period the Bank approved a total of roughly US\$140 million in TCs with gender and diversity elements. This translated, on average, into 15 TC operations in gender and 25 TC operations in diversity per year. It is notable that 20% of the gender and diversity TC operations approved benefitted more than one country.



**FIGURE 3.2**  
GD technical cooperation,  
2011-2016

Source: OVE, based on Data Warehouse and GDI.





Bank operations in gender were generally aligned with regional and country challenges in LAC, including efforts to improve women's economic empowerment and health outcomes, and to a lesser extent addressing violence against women and improving women's voice and agency.

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Beyond the operational portfolio, the Bank provides support for gender and diversity—and especially gender—through analytical work, strategic partnerships, and policy dialogues. Between 2011 and 2016 the IDB has substantially expanded its portfolio of analytical work on both gender and diversity, through different products, including sectoral guides, country diagnoses, impact evaluations, and the development of datasets. The Bank provided this type of support relatively more for gender than for diversity. As a result, OVE is better able to describe the IDB's contribution to the body of knowledge on gender in the region.

Although OVE was unable to assess the effectiveness of the GD portfolio, it did not find evidence that the extent of implementation of gender and diversity activities was different from that of other activities. In the field studies, OVE analyzed 46 operations that mainstreamed gender and diversity. In only one project did OVE find that a gender activity was not implemented as planned. Moreover, in a few projects OVE discovered that gender and diversity activities had been implemented more extensively than proposed in the approval documents.

The rest of this chapter assesses Bank activities supporting gender and diversity and the degree to which the lending operations integrate these issues. Because loans and TCs are the main channels through which the Bank promotes gender and diversity, OVE's analysis focuses mostly on the trends, thematic relevance, and degree of integration of gender and diversity in these instruments. However, because the gender and indigenous policies call on the Bank to also mainstream gender and diversity in CSs, knowledge, and outreach, we provide some evidence of the level of the Bank's effort in these activities.

## B. EXTENT OF ACTIVITIES THAT MAINSTREAM GENDER

### 1. Trends in the level and thematic relevance of activities

Analysis of the Bank’s CSs suggests that the Bank has increasingly included gender in the country dialogue. Over time, an increasing number of CSs have included gender: 18 of the most recent CSs included gender diagnostics, indicators, or both, while 7 contained gender as a cross-cutting issue (Table 3.2).<sup>37</sup> As more CSs began to include gender as a priority, the Bank increasingly expanded its loan and TC portfolio in areas prioritized in these documents—mostly health (especially maternal care and teen pregnancy) and gaps in the labor market.

Bank operations supporting gender issues have largely been present in countries that have included gender in their CSs (Table 3.2). Exceptions include Haiti and Jamaica, where gender was recently prioritized in CSs but the number of loans and TCs with gender elements were below the Bank’s average per country through the evaluation period. Similarly, Belize and Guyana included gender as a cross-cutting theme in their most recent CSs, but the numbers of loans and TCs with gender elements approved over the evaluation period were below the country average.

TABLE 3.2. BANK ENGAGEMENT IN GENDER ISSUES (SG AND NSG, 2011-2016)

		Gender in country program			
		No. of loans		No. of TCs*	
		Above average	Below average	Above average	Below average
Gender in Country Strategy**	Diagnosis / indicator / both	Argentina Bolivia Brazil Dominican Republic Ecuador El Salvador Nicaragua Paraguay Uruguay	Chile Colombia Guatemala Haiti Jamaica Panama Suriname Trinidad & Tobago Venezuela	Chile Colombia Dominican Republic El Salvador Guatemala Panama Paraguay Suriname Trinidad & Tobago Venezuela	Argentina Bolivia Brazil Ecuador Haiti Jamaica Nicaragua Uruguay
	Cross-cutting theme	Costa Rica Honduras Mexico Peru	Barbados Belize Guyana	Barbados Honduras Mexico Peru	Belize Costa Rica Guyana
	None		Bahamas	Bahamas	

\* Analysis excludes 43 regional TCs.

\*\* Based on the latest CS approved for each country.

Note: Highlighted countries are those for which both loan and TC averages are below country average.

Source: OVE, based on Data Warehouse and CSs.

OVE assessed the content of the operations supporting gender and concluded that, in line with the priorities identified in the SFD, during the evaluation period the Bank increasingly focused on “second-generation” issues—especially economic gaps in labor force participation and entrepreneurship (Figure 3.3). OVE identified 135 loan operations that addressed gender gaps in the labor market, largely by monitoring or setting targets for the gender distribution of training beneficiaries. Moreover, 87 loans addressed the issue of economic gaps between men and women in entrepreneurship, especially through the private sector windows, with operations that were often complemented by MIF TC support.<sup>38</sup> Among other initiatives, the MIF approved at least 15 operations to support women’s entrepreneurship during the evaluation period. Women entrepreneurship Banking (weB) is an initiative launched jointly by the MIF and SCF in 2012 that supports financial institutions with both technical assistance and loans to develop lending models that support women-led micro, small, and medium-sized businesses. The Bank continued to work on general issues affecting women’s health, especially teen pregnancy, and expanded its portfolio in VAW—especially in coordination with citizen security programs—and in women’s voice and agency, for which examples range from setting targets for the inclusion of women in water committees to adding conditions for joint ownership of Bank-financed housing.

**FIGURE 3.3**  
**Thematic distribution**  
**of loan operations with**  
**gender elements (number of**  
**operations), 2011-2016**

*Note:* Each operation can include multiple themes.

*Source:* OVE, based on Data Warehouse.

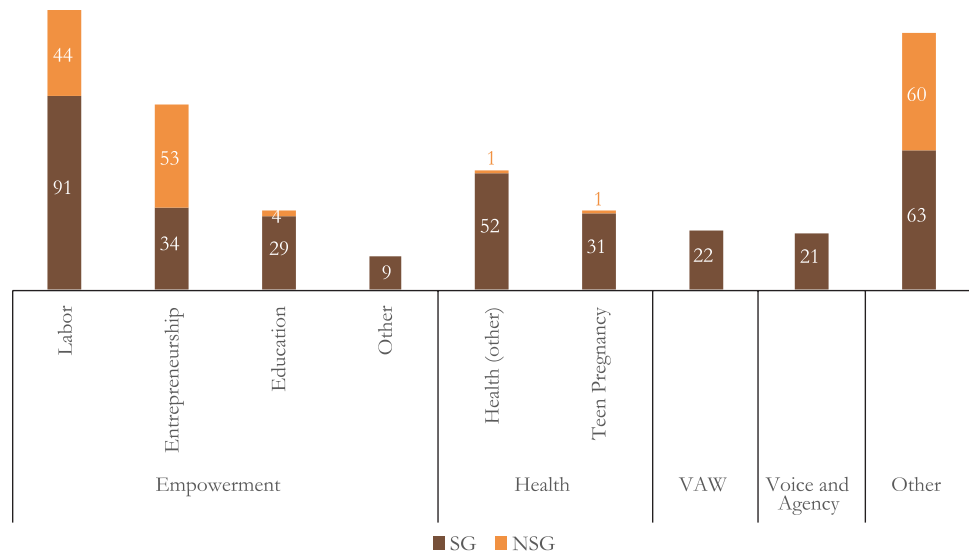




TABLE 3.3. HEATMAP OF INCLUSION OF GENDER ELEMENTS IN BANK LENDING OPERATIONS BY DIVISION, 2011-2016

		Thematic areas								Nature of the of gender elements (stylized trends)
		Health	Teen pregnancy	Education	Labor	Entrepreneurship	Voice and Agency	VAW	Other	
SCL	EDU									Mostly in the form of GDRs (often there is no baseline, but the results matrix reads that indicators will be disaggregated whenever possible).
	GDI									Ciudad Mujer programs, which provide integrated services for women in sexual and reproductive health, economic empowerment, and VAW.
	LMK									Activities for training women for the labor market and targets regarding their job placement.
	SPH									Activities to reach out to the target populations (including campaigns), as well as trainings for administrative staff, and GDRs/GRRs.
INE	ENE									Activities and targets to promote the training of women in technical jobs, and/or to monitor women beneficiaries. Consultation with women.
	TSP									Training and employment of women in the sector; surveys to diagnose gender challenges in public transportation. Consultation with women.
	WSA									Training in water and solid waste administration; targets for women's participation in community organizations. Consultation with women.
IFD	CMF									Diagnoses of women's challenges to access financing, and promotion of activities and/or targets (GDRs and GRRs) to address them.
	CTI									GDRs and GRRs to target women as beneficiaries of scholarships, and R&D innovation programs.
	FMM									"Gender sensitive" training for government staff, and research to assess labor gaps and VAW in different contexts.
	ICS									Training to generate gender awareness in law enforcement institutions; monitor VAW in the context of citizen security or access to justice.
CSD	CCS									Targets (GDRs) regarding women's participation.
	HUD									Training of women in community centers on labor and VAW issues; target women as beneficiaries of home improvements and/or titling.
	RND									Training and technical assistance on technology, techniques, management, especially targeting women. Consultation with women.
INT	TIU									GDRs.
	TIN									Training and technical assistance for women, as well as GDRs to monitor labor market gaps in the sector.
Private sector	CFI									Promote women's participation through the inclusion of GDRs for share of women employed in beneficiary companies, and GDRs of beneficiaries.
	FMK									Financial products aimed at women entrepreneurs to reduce access to finance gaps (weB); GDR of women employed in beneficiary banks.
	INF									Promote women's participation through the inclusion of GDRs for share of women employed in beneficiary companies, and GDRs of beneficiaries.
	SMU									Promote women's participation through the inclusion of GDRs for share of women employed in beneficiary companies, and GDRs of beneficiaries.
	OMJ									Promote women's participation through the inclusion of GDRs for share of women employed in beneficiary companies, and GDRs of beneficiaries.
	IIC									Promote women's participation through the inclusion of GDRs for share of women employed in beneficiary companies, and GDRs of beneficiaries.

Note: Darker color indicates larger number of loans that address a certain thematic area, ranging from 0 (white) to 47 (darkest brown). Each operation can address more than one thematic area. Excludes grants and reimbursable TC.

References: GDR: Gender-Disaggregated Result, GRR: Gender-Related Result (See Footnote 39 for details); SCL: Social Sector, EDU: Education, GDI: Gender and Diversity, LMK: Labor Markets, SPH: Social Protection and Health; INE: Infrastructure and Energy, ENE: Energy, TSP: Transport, WSA: Water and Sanitation; IFD: Institutions for Development, CMF: Capital Markets and Financial Institutions, CTI: Competitiveness, Technology and Innovation, FMM: Fiscal and Municipal Management, ICS: Institutional Capacity of State; CSD: Climate Change and Sustainable Development, CCS: Climate Change, HUD: Housing and Urban Development, RND: Environment, Rural Development & Disaster Risk Management; INT: Integration and Trade, TIU: Trade and Investment Unit, TIN: Trade and Integration; Private Sector 2011-2015: CFI: Corporate Finance, FMK: Financial Markets, INF: Infrastructure, SMU: Strategic Management, OMJ: Opportunities for the Majority; IIC: Inter-American Investment Corporation (2016). CFI, FMK, INF, and SMU were part of the Structured and Corporate Finance Department (SCF).

Source: OVE, based on Data Warehouse and Portfolio Analysis.

The IDB's Social Sector divisions have mainstreamed gender themes most actively;<sup>39</sup> nonetheless, divisions in the Infrastructure and Energy (INE) and Climate Change and Sustainable Development Departments (CSD) have increasingly integrated gender over time, even in thematic areas that do not necessarily correspond to their sectors (Table 3.3). The Social Protection and Health Division (SPH) had the most loans incorporating gender issues throughout the evaluation period, especially in health. However, several divisions in INE and CSD—specifically Water and Sanitation (WSA), Transport (TSP), Energy (ENE), Environment, Rural Development & Disaster Risk Management (RND), and Housing and Urban Development (HUD)—showed a positive trend in mainstreaming gender issues, especially gender gaps in the labor market and voice and agency. Examples range from promoting women's capacity to work in construction to fostering women's participation in decision-making in community water associations. Operations in the private sector also addressed labor gaps—mostly by tracking gender-disaggregated employment indicators—and entrepreneurship gaps, including access to finance. Except for NSG windows, all these sectors have increasingly included at least one GDI staff in their project design teams.

The Bank has increasingly used TC to promote gender issues in the region, especially through client support and research and dissemination activities. During the evaluation period the Bank approved US\$36 million in 91 TCs with gender elements. Of these TC operations, 56% provided client support (for example, financing studies and regional events), 16% supported operations, and 28% financed research on specific topics that were often reflected in mainstreaming of gender in loans, such as “Operational Innovation in Trade and Gender” (RG-T2180), “Gender Perspective in the Construction of Transport Infrastructure” (RG-T2618), and “Violence against Women in the Caribbean” (RG-T2450). TCs for dissemination included the Economic Empowerment of Women Conference (RG-T2657) and the Open Dialogue and Knowledge Exchange on Domestic Violence and Citizen Security (RG-T2658).

During the evaluation period the Bank developed a vast body of knowledge products on gender issues aimed at supporting Bank operations and expanding the understanding of gender gaps in the region (Box 3.1). In 2011-2016 the Bank produced at least 35 technical notes and guides aimed at facilitating the mainstreaming of gender issues in operations by, for example, collecting systematic information on policies and practices that have shown to work in the region. It also conducted at least 57 studies that address a variety of gender issues and identify, diagnose, and measure the region's most pressing gender gaps. Indeed, the number of notes and studies produced in 2014-2016 exceeded the targets established in the 2014-2016 GAP. In line with these activities, the Bank increased the number of impact evaluations (IEs) of its operations that included gender, to strengthen the business case for gender equality and to help better understand the effectiveness of different approaches in promoting gender equality and women's empowerment.

**Box 3.1. Knowledge products on gender during the evaluation period**

**Technical notes.** The Bank produced 36 gender-related technical briefs and guides to facilitate the mainstreaming of gender issues in its operations (IDB 2014, IDB 2017b). More than 50% of these were developed by SCF, ICS, and the MIF. GDI directly produced 4 of these and collaborated with other sectors in the production of 7 more and thus was involved in the production of 31% of the gender technical notes and guides produced in this period.

**Studies on gender.** The Bank also produced 57 studies addressing a variety of gender issues (IDB 2014, IDB 2017b): economic and sector work, working papers, discussion papers, and books produced by different sectors (including RES and MIF). Roughly 65% of these studies focused on female labor participation, VAW, and women's entrepreneurship and access to finance, while the rest focused on women's health, education, and other topics.

**Gender in Impact Evaluations.** Between 2011 and 2016, the Bank completed 17 IEs that either assessed gender-related impacts or evaluated interventions with a heavy focus on gender, and 26 more are ongoing (IDB 2017b). According to OVE's IE evaluation of the 7 completed evaluations produced exclusively by GDI, the quality of these IEs seems to be increasing over time, as more than 80% were rated satisfactory or partially satisfactory for quality (the highest percentage out of every division/sector of the IDB), mainly because of better prioritization mechanisms, given the constraints in GDI's capacity to generate IEs compared to big IE producers (OVE 2017).

The Bank has further promoted gender issues in the region through policy dialogues and strategic partnerships. In 2011-2016 the Bank conducted at least 30 outreach events on gender issues, including dissemination and awareness-raising events, regional policy dialogues, and high-level dialogues (IDB 2014, IDB 2017b). Seventeen regional policy dialogues and high-level dialogues took place in 2014-2016 alone, surpassing the 2014-2016 GAP target of 5. The Bank also launched the Network of Women Leaders in the Public Sector, a platform to connect and promote exchanges and learning between women who occupy or aspire to occupy leadership positions in the public sector in LAC, also meeting the 2014-2016 GAP target. Other initiatives the Bank has supported include ConnectAmericas for Women, which seeks to expand opportunities for women entrepreneurs in LAC, and the Gender Network, led by GDI, that has helped regional policy dialogues addressing VAW and adapting the *Ciudad Mujer* model to other countries.

## 2. Relative degree of integration of gender in the lending portfolio

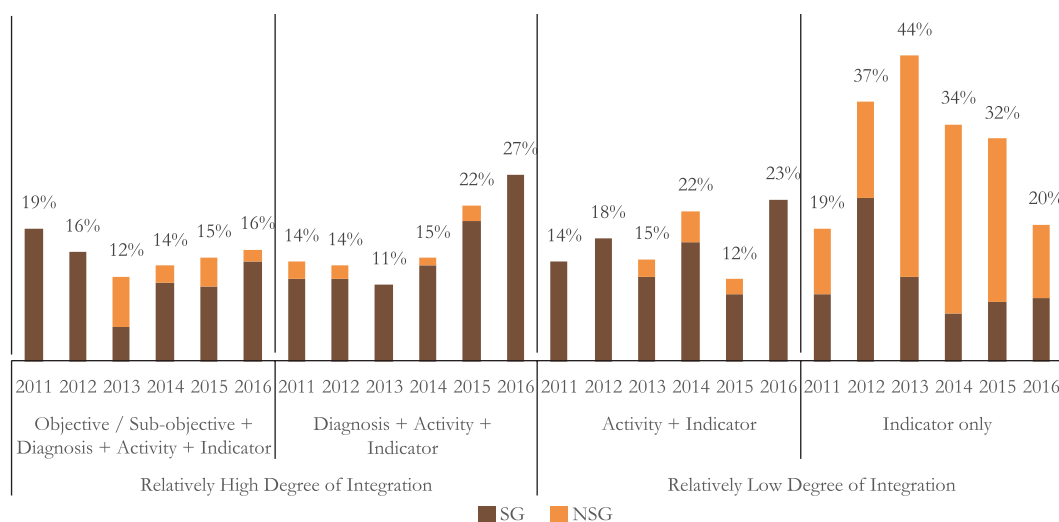
The Bank's corporate indicators that measure gender mainstreaming focus primarily on the *number* of activities as opposed to the qualitative aspects of those activities; therefore, OVE developed and implemented a classification system to measure



the extent to which loans mainstream gender: the relative degree of integration. When building and reviewing the GD portfolio, OVE assessed the degree to which operations integrated gender (and diversity) in four components of project design: objectives or sub-objectives, diagnostics, activities, and results indicators. The degree to which gender is integrated in an operation is positively related to the number of interrelated components that incorporate gender. For example, loans that integrate gender in all four components exhibit a greater relative degree of integration than those that include only gender-related indicators.

The relative degree to which individual lending operations integrated gender increased during the evaluation period (Figure 3.4). The share of loan operations with a relatively high degree of integration of gender elements in the project's vertical logic (i.e., those projects that have a gender objective or sub-objective and diagnosis, activity, and M&E related to the objective—which naturally include direct investment operations) has remained constant throughout the period, though the absolute number increased slightly. Nonetheless, the share of operations that have a relatively high degree of integration of gender elements but lack a gender objective or sub-objective (i.e., those that include a gender diagnosis, activity, and M&E) grew over the evaluation period. Overall, 33% of loans integrating gender in 2011 had a relatively high degree of integration, while in 2016 the share increased to 43%. Boxes 3.2 and 3.3 provide examples of relatively high degrees of integration of gender in nontraditional sectors based on OVE's field studies (for examples of traditional sectors, see [Annex II](#), Box II.1).

The share of operations that integrated gender through activities and/or M&E also increased from 23% in 2011 to 43% in 2016—mainly driven by greater integration of both (Figure 3.4). Aside from operations that are required to conduct consultation with women because they trigger the safeguards of OP-761, the number of operations that included consultation with women beneficiaries increased during the evaluation period. Other activities complementing the inclusion of indicators ranged from training and employing women beneficiaries, to surveys to address their needs in public transportation, or campaigns against VAW. (Boxes 3.2 and 3.3 provide examples from OVE's field studies.)



**FIGURE 3.4**  
Relative degree of integration of gender elements (as share of all operations with any gender element)

Note: Because some operations do not fall under any category (for instance, operations that included only a gender-related activity), annual percentages do not necessarily add up to 100%.

Source: OVE, based on Data Warehouse.

### Box 3.2. Examples of gender mainstreaming in transport projects

In its field visits, OVE found multiple examples of efforts by non-traditional sectors to integrate gender-related diagnoses, activities, and M&E in their operations—particularly by addressing gender gaps in the labor market. The Transport division (TSP) stands out for their efforts to diagnose gender gaps in the construction labor market, including specific activities to address them, and indicators to monitor them. The 2015 Gender and Transport Action Plan pushed forward pilots to include women as part of the workforce in the sector in Bolivia, Nicaragua, and Paraguay, using previous experiences in Haiti and Peru as background projects. OVE visited Bolivia’s PRIMAR program and Nicaragua’s Road Integration Program; moreover, OVE also interviewed Bank counterparts of Uruguay’s Productive Rural Roads CCLIP.

The primary way these programs have addressed gender gaps in the labor market has been through a combination of diagnoses of sector-specific gaps and activities to train—and potentially employ—women in highway construction activities. The programs reviewed point out that some male-dominated sectors, such as construction, contribute to amplifying gender inequalities arguing that, for example, some construction jobs usually taken by men are better paid than the alternative employment for women. In Bolivia, lessons from PRIMAR I helped the Bank implement a pilot of training and employment of women in operation of heavy machinery for highway construction. A similar pilot was implemented in Nicaragua since the first loan operation of the Road Integration Program. In Uruguay, on the other hand, the operation recognized the lack of understanding of the underlying factors behind these gaps, and assigned a budget of \$150,000 for the project executing unity (PEU) to implement activities to promote gender equality in the sector, including a diagnostic study.

**The design and implementation of gender elements evolved with experience.**

In Bolivia OVE noted that the gradual inclusion of gender issues in the PRIMAR helped the PEU develop sensitivity for gender issues and advance toward more ambitious targets in the second operation. In this sense, there was an increase in the degree of integration of gender issues across the program, as the first operation included only activities and M&E mostly related to voice and agency issues, while the second operation added a diagnosis in labor market gaps, as well as targets for training women in heavy machinery. Nevertheless, interviews conducted by OVE revealed that, with few exceptions, it was hard to find women interested in training in the sector and to hire them once trained. Following a similar model, both operations in the Road Integration Program in Nicaragua included a pilot to train 12 women, but the second phase of the project dropped the employability target because the preparation of the operation identified that the labor inclusion component was fulfilled given the new opportunities for women with other employers after the training (such as in COERCO public cooperatives). Despite the different contexts in Bolivia and in Nicaragua the Bank was well recognized by country officials for pushing forward these initiatives to mainstream labor gender elements in transportation programs. In this line, the Office of Planning and Budget, the PEU of the Rural Roads CCLIP in Uruguay, highlighted the Bank's innovative initiative in considering gender issues proactively in infrastructure operations, and remarked that this helped them identify opportunities in non-traditional sectors that will likely translate in similar efforts in future projects.

For details see [Annex II](#), Table II.2.

**Box 3.3. Examples gender mainstreaming in citizen security projects**

**OVE found examples of strong gender mainstreaming in citizen security operations.** Uruguay's *Comprehensive Citizen Security Program* (UR-L1112) builds on the experience of 2012's *Local Public Safety Integrated Management Program* (UR-L1062)—which had only included gender-related activities and indicators—to include a specific objective and diagnosis, as well as more ambitious activities and M&E related to VAW in the family context. These activities include evidence-informed programs to combat domestic violence, community initiatives aimed at changing norms regarding intimate partner violence, and trainings in techniques to raise awareness about domestic violence. The associated indicators are mostly related to reported cases of VAW and the social acceptance of it in the target areas. In Jamaica, the *Citizen Security and Justice Program III* (JA-L1043) includes a diagnosis of the role of women in violence, as well as community plans to assess women's safety issues, and activities and indicators regarding support to women in recovery. The project also addresses the challenges of masculinity and gender norms and how they affect young men's decisions to partake in crime and violence, as well as men's roles as fathers.

For details see [Annex II](#), Table II.2.



Even though the inclusion of gender-disaggregated and gender-related indicators in loan operations has been increasing,<sup>40</sup> the inclusion of outcome indicators is positively related to the relative degree of integration of gender (Table 3.4). Among operations with high integration of gender elements, 81% of SG operations and 46% of NSG operations have outcome indicators, and roughly two in every three of such operations also have output indicators. As the relative degree of integration decreases, operations tend to include output (rather than outcome) indicators. SG operations are highly likely to include GRRs, except when the only gender element is an indicator, in which case it is more likely a gender-disaggregated result (GDR).

TABLE 3.4. CHARACTERISTICS OF INDICATORS INCLUDED IN LOANS WITH GENDER ELEMENTS, 2011-2016

	SG				NSG			
	Objective / Sub-objective + Diagnosis + Activity + Indicator	Diagnosis + Activity + Indicator	Activity + Indicator	Indicator only	Objective / Sub-objective + Diagnosis + Activity + Indicator	Diagnosis + Activity + Indicator	Activity + Indicator	Indicator only
No. of operations	48	66	128	45	13	5	13	89
Share of operations with output and outcome indicator(s)	25%	24%	20%	13%	31%	20%	23%	1%
Share of operations with output but no outcome indicator(s)	15%	50%	55%	49%	46%	80%	77%	88%
Share of operations with outcome but no output indicator(s)	56%	20%	20%	29%	15%	0%	0%	0%
Share of operations with at least one GDR	27%	50%	49%	84%	62%	80%	92%	98%
Share of operations with at least one GRR	94%	76%	75%	16%	100%	40%	38%	11%

Source: OVE, based on Data Warehouse.

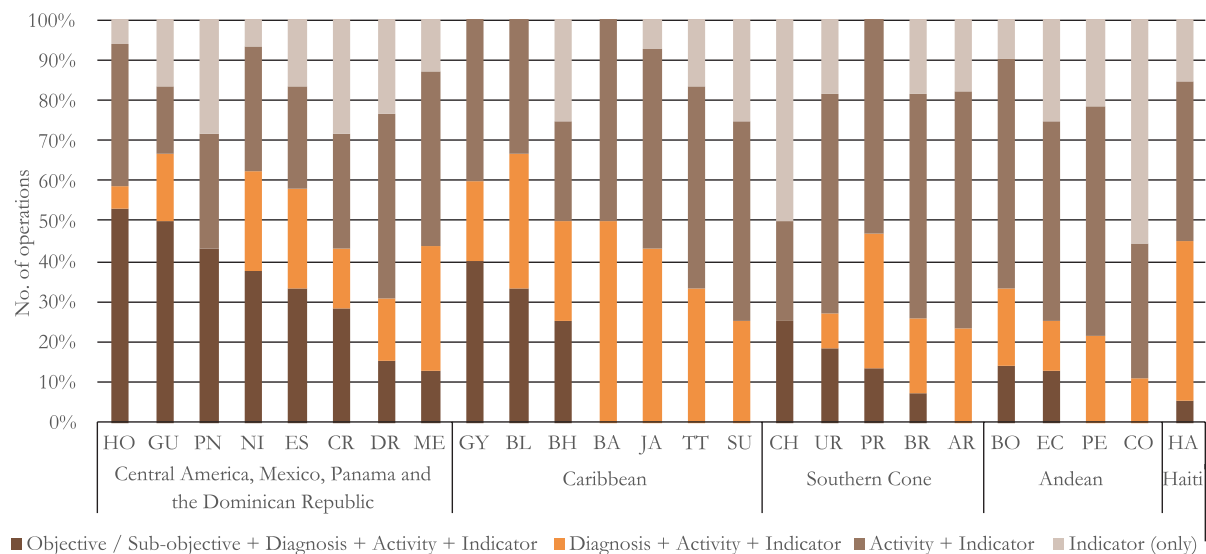
Policy-based operations that included at least one gender element tended to have lower degrees of integration than investment loans. During the evaluation period the Bank approved 21 policy-based operations with gender elements, of which 5 also had diversity elements, mostly in the context of social reforms, especially in health. However, almost none of these policy-based loans included gender-related conditionality for disbursement. One-third of these loans only had a gender-disaggregated indicator, and another third combined an indicator with an activity. ([Annex II](#), Box II.2. describes examples from OVE's field studies.)

Private sector windows have actively mainstreamed gender elements in their operations, although the degree of integration has remained relatively low compared to SG loans. OVE identified 13 NSG operations that had a gender objective or sub-objective, a diagnosis of the problems, activities to address them, and M&E indicators. These operations were mostly part of programs that were complemented with MIF grants exhibiting strong vertical logic in gender through the weB initiative. The lending components mostly financed the expansion of micro, small, and medium enterprises (MSME) portfolios for women in local banks, including Itau Unibanco Women-Owned MSME Partnership (BR-L1437), which was led by SCF in 2015, but is considered by GDI as a direct investment in gender. Nevertheless, most NSG operations mainstreamed gender elements by including gender-related indicators.

Overall, the relative degree of integration of gender elements in loan operations varied across countries, but was positively related to the degree that gender was integrated in the CS (Figure 3.5). Countries that included diagnoses, indicators, or both in their latest CSs were relatively more likely to have operations that included gender-related diagnoses or activities, in addition to indicators. The relative degree of integration was somewhat greater in Central American countries, which exhibited a greater share of operations that integrated gender through the inclusion of objective/sub-objective, diagnosis, activity, and M&E, as compared to other sub-regions. According to the IDB's 2016 General Perceptions Survey, Central America is the sub-region that assigned relatively greater importance to gender and diversity as a pressing development challenge the Bank should focus on.

**FIGURE 3.5**

**Degree of integration of gender elements in loan operations (share of total operations with some gender element by country), 2011-2016**



Source: OVE, based on Data Warehouse.

## C. EXTENT OF ACTIVITIES THAT MAINSTREAM DIVERSITY

### 1. Trends in the level and thematic relevance of activities

In contrast to the Bank's work on gender, diversity has been incorporated relatively less in country dialogues, as is consistent with the localized nature of diversity issues. Even though there has been an increase in the number of CSs that include diversity, only 6 do so with diversity diagnostics and/or indicators, and 11 include diversity as a cross-cutting theme.

For those countries for which diversity is included in the CSs, the Bank's focus has been on development with identity for indigenous peoples, as opposed to African descendants. Bank support for diversity has mostly focused on indigenous populations, but a review of CSs suggests that this distribution is in line with country demand (Table 3.5), as the Bank has combined lending and TC to address these issues in Bolivia, Ecuador, Guyana, Peru, and Chile. In Paraguay the Bank has approved fewer operations than average, but those operations have addressed key issues, such as helping the census include diversity aspects, to gather data on the indigenous populations.

TABLE 3.5. BANK ENGAGEMENT IN DIVERSITY ISSUES (SG AND NSG, 2011-2016)

		Diversity in country program			
		No. of loans		No. of TCs*	
		Above average	Below average	Above average	Below average
Diversity in Country Strategy **	Diagnosis / indicator / both	Bolivia <sup>2</sup> Ecuador <sup>1,2</sup> Guyana <sup>2</sup> Peru <sup>2</sup>	Chile <sup>2</sup> Paraguay	Bolivia <sup>2</sup> Peru <sup>2</sup> Ecuador <sup>1,2</sup>	Chile <sup>2</sup> Paraguay Guyana <sup>2</sup>
	Cross-cutting theme	Brazil <sup>1</sup> Colombia <sup>1</sup> Honduras <sup>2</sup> Mexico <sup>2</sup> Nicaragua <sup>1,2</sup> Uruguay <sup>1</sup>	Argentina Belize <sup>1</sup> Costa Rica <sup>1</sup> Guatemala <sup>2</sup> Panama <sup>1,2</sup>	Brazil <sup>1</sup> Colombia <sup>1</sup> Guatemala <sup>2</sup> Honduras <sup>2</sup> Mexico <sup>2</sup> Panama <sup>1,2</sup>	Argentina Belize <sup>1</sup> Costa Rica <sup>1</sup> Nicaragua <sup>1,2</sup> Uruguay <sup>1</sup>
	None	-	Barbados Bahamas Dominican Republic <sup>1</sup> El Salvador Haiti Jamaica Suriname Trinidad and Tobago Venezuela	-	Barbados Bahamas Dominican Republic <sup>1</sup> El Salvador Haiti Jamaica Suriname Trinidad and Tobago Venezuela

\* Analysis excludes 35 regional TCs.

\*\* Based on the latest CS approved.

<sup>1</sup> >5% of population African descendants (we exclude the English-speaking Caribbean and Haiti, per footnote 28).

<sup>2</sup> >5% of population indigenous.

Source: OVE, based on Data Warehouse and CSs.



Operations with diversity elements were relevant to the local challenges (though there was greater focus on indigenous people than on African descendants), focusing on expanding indigenous communities' access to infrastructure and services (specially water and sanitation, and energy) and human capital development (health and education).

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The Bank's diversity-related operations, like its CSs, focused more on development with identity for indigenous peoples than for African descendants—especially regarding the expansion of these communities' access to infrastructure and services and human capital development. During the evaluation period the Bank approved 94 loans that considered indigenous peoples' or African descendants' specific needs in terms of access to infrastructure and services beyond a safeguards approach, at a ratio of roughly three loans with some element related to indigenous peoples for every loan with some element pertaining to African-descendant populations. Of these operations, 45 expanded access to infrastructure and services—especially water and sanitation, and energy—and 37 tackled human capital development issues, mostly health and education (Figure 3.6). In contrast to gender operations, the themes of the diversity operations have been more closely aligned to the primary objectives of the sector divisions leading them (Table 3.6).

**FIGURE 3.6**  
**Thematic distribution of loan operations with diversity elements (number of operations), 2011-2016**

Note: Each operation can include multiple themes.

Source: OVE, based on Data Warehouse.

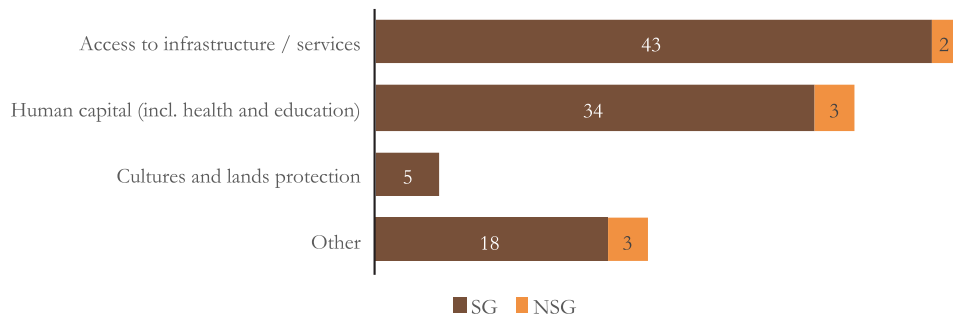




TABLE 3.6. HEATMAP OF INCLUSION OF DIVERSITY ELEMENTS IN BANK LENDING OPERATIONS BY DIVISION, 2011-2016

		Thematic areas				Nature of the diversity elements (general trend)
		Human capital (incl. health and education)	Access to infrastructure / services	Cultures and lands protection	Other	
SCL	EDU					DDRs.
	GDI					-
	LMK					DDRs.
	SPH					Action plans or programs to reach indigenous populations, and DDRs.
INE	ENE					Target indicators (DDRs and DRRs) for indigenous and/or African-descendant beneficiaries.
	TSP					-
	WSA					Consultation with local communities and target DDRs to reach indigenous / African descendants.
IFD	CMF					-
	CTI					Activities to build awareness (such as producing racially aware handbooks).
	FMM					Activities to increase governments' accessibility (such as diversity-inclusive language in web portal).
	ICS					Trainings to generate diversity awareness in police forces and other institutions; DDRs to monitor citizen security or access to justice.
CSD	CCS					-
	HUD					DDRs.
	RND					Consultation with local communities and target DDRs to reach indigenous / African descendants.
INT	TIU					-
	TIN					-
Private sector	CFI					Capacity-building activities; Shared Value Approach.
	FMK					Diagnoses of gaps in access to finance and design of relevant products for these populations.
	INF					-
	SMU					-
	OMJ					-
	IIC					-

Note: Darker color in heatmap indicates larger number of loan operations that address a certain thematic area, ranging from 0 (white) to 15 (darkest brown). Each operation can address more than one thematic area. Excludes grants and reimbursable TC.

References: DDR: Diversity-Disaggregated Result, DRR: Diversity-Related Result (See Footnote 40 for details).

Source: OVE, based on Data Warehouse and portfolio analysis.

A significant share of the Bank's support for diversity issues in the region has been through TCs. The Bank approved roughly US\$116 million in 145 TC operations with some diversity element during the evaluation period. Of these operations, 64% were client support, and 25% provided operational support such as the "Sociocultural Feasibility of the Indigenous Development and Promotion Program" (CH-T1169), which was aimed at supporting the design and implementation of the Indigenous Entrepreneurship Support Program (CH-L1105). However, many TCs that provided operational support backed loans that did not have diversity-related objectives, which suggests that TCs may have worked as a way of mainstreaming diversity issues into loans.

The Bank has used TCs—including at the regional level—to address evolving diversity challenges. The Bank has been able to use TCs to meet diversity challenges that are beyond the scope of the SFD. For example, in 2016 the Bank approved Latin American and Caribbean Coalition against Racism, Discrimination, and Xenophobia (RG-T2897), a TC that creates a regional public good by financing tailor-made programs in four cities in the region, including one for lesbian, gay, bisexual, and transgender issues in Montevideo.

The Bank has generated relatively fewer knowledge products and policy dialogues and strategic partnerships on diversity than it has on gender, but they have been arguably better focused. Diversity-related knowledge products produced by the Bank have focused on specific needs of the region; some of the most emblematic products include a TC to support the Bank's ability to design future operations (for example, in biodiversity and ecosystem services), the development of quality data on race and ethnicity for citizen security, the elaboration of an interactive map to produce educational materials laying out terrestrial and hydrological resources of the Amazon basin, and the design of an online social media platform for small- and medium-sized enterprises (similar to ConnectAmericas). Related tools range from a diversity dashboard to SEPPIR Data, a diagnostic monitoring tool of strategic policies for the promotion of racial equality in Brazil. Moreover, two policy dialogues on diversity were completed with regional policymakers under the leadership of GDI: the meeting in 2015 focused on the role of indigenous peoples in biodiversity conservation, and the meeting in 2017 on ethnic and racial inclusion under public-private partnerships in LAC.

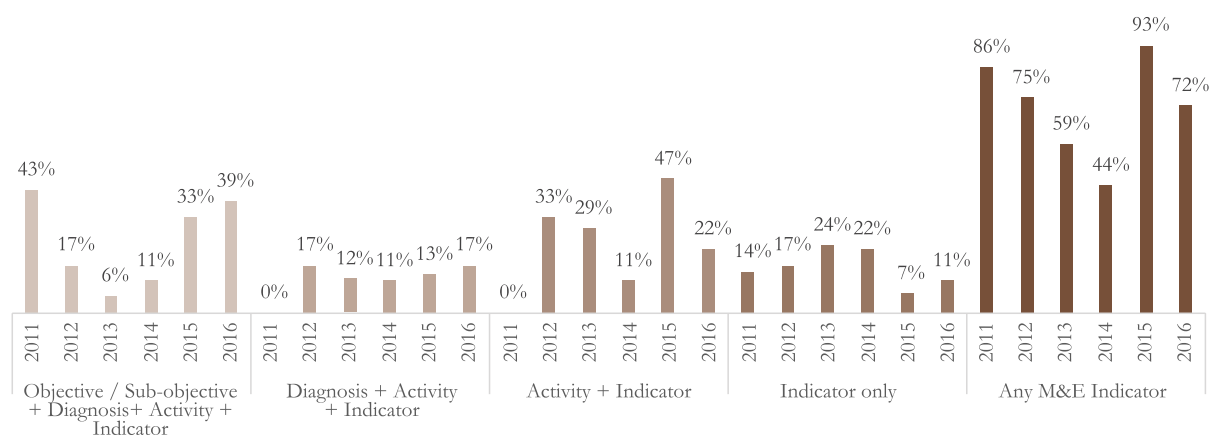
## **2. Relative degree of integration of diversity in the lending portfolio**

The Bank currently lacks a systematic tracking system to measure the integration of diversity elements into Bank operations, so, as for gender, OVE assessed the degree of integration of diversity elements into Bank operations. GDI has made efforts to identify Bank operations that address indigenous or African descendant populations' issues by building a dataset, but there is no information on how these operations are designed to mainstream diversity. SPD only recently began tracking strategic

alignment to gender and diversity together. Therefore, OVE assessed the degree to which operations integrated diversity following the methodology presented for gender.

OVE found that over time Bank loans addressing diversity increased not only in number, but also in the degree to which they integrated diversity, although the increase was not as pronounced as that for gender (Figure 3.7). OVE’s analysis concluded that there has been an upward trend in the number and share of operations with a relatively high degree of integration of diversity elements. This trend was especially driven by operations that included diversity-related objectives or sub-objectives, diagnoses, activities, and results indicators, while the share of operations that included only diagnoses, activities, and results indicators remained constant over the evaluation period.

FIGURE 3.7. INTEGRATION OF DIVERSITY ELEMENTS IN LOAN OPERATIONS (SHARE OF TOTAL OPERATIONS WITH SOME DIVERSITY ELEMENT), 2011-2016



*Note:* OVE identified eight NSG loans that worked on diversity issues during the evaluation period. Only one of them had Objective/Sub-objective + Diagnosis + Activity + Indicator. The other seven had some isolated element, hence failing to fall into any of the other integration categories.

*Source:* OVE, based on Data Warehouse.

In addition, the share of loans that include indicators associated with activities has increased; however, it is likely that part of the increase is more related to the implementation of the indigenous safeguards policy than to the increased capacity of sector specialists. OVE found that there has been an increase in the number of operations that include consultations with indigenous communities, which is a requirement of the safeguards policy. However, this suggests that, even when diagnoses may be missing, the specific needs and conditions of the communities have been taken into consideration. (Box 3.4 provides examples from OVE’s field studies.)

Loan operations have increasingly included indicators to track diversity-disaggregated and diversity-related results. The Bank has recognized the challenge of the lack of diversity-disaggregated data in the region. As a result, loans supporting diversity issues have increasingly included indicators to gather such data. OVE found that these data have been used to inform operations (especially loan programs) addressing diversity challenges in the region.

### *Box 3.4. Examples of diversity mainstreaming*

**RND developed some of the most emblematic examples of relatively high degrees of integration of diversity elements in Bolivia.** Examples range from programs aimed at enhancing agricultural productivity in indigenous communities, such as the Direct Support for the Creation of Rural Agrifood Initiatives II (BO-L1096) and PRONAREC III (BO-L1106), to programs to increase legal land ownership, such as the Land Administration Program (BO-L1113). These operations have typically included diagnoses with relevant information about the problems the targeted indigenous groups faced, specific activities to include these populations in the consultation process, and diversity-disaggregated output indicators to monitor them.

**As with gender, investment loan programs—as opposed to isolated loan operations—seemed to facilitate incrementally higher degrees of integration of diversity elements in Bolivia.** Team leaders and PEUs interviewed by OVE highlighted the importance of long-term programs that included diversity elements for engaging the communities and generating useful knowledge. For example, PRONAREC III includes an analysis of the target indigenous populations, building on the work of PRONAREC I and II.

**There is evidence of efforts to address diversity issues though the inclusion of activities and/or indicators in WSA and SPH projects.** Examples from WSA projects in Bolivia and SPH in Nicaragua show that consultation with local communities and diversity-sensitive trainings have been common activities to mainstream diversity in these sectors. Nevertheless, OVE found that the impact of these consultations is not always captured in Bank documents; for example, consultations during the execution of Bolivia's Water and Sanitation Program for Small Towns and Rural Communities (BO-L1065) shed light on the fact that bathroom design did not consider the width of women's traditional skirts, and catalyzed bathroom redesign before further construction.

For details see [Annex II](#), Tables II.4 and II.5.

As for gender, indicators with relatively higher degrees of integration of diversity issues were more likely to include diversity-related results (DRRs)<sup>41</sup> as outcome indicators (Table 3.7). Only in operations that integrated diversity solely through the inclusion of an indicator were such indicators more likely to be diversity-disaggregated results (DDR), rather than DRRs. Nevertheless, most team leaders and country counterparts interviewed by OVE pointed out that there is value in creating diversity-disaggregated information, as the lack of such data is usually a constraint for mainstreaming diversity elements into operations.



TABLE 3.7. CHARACTERISTICS OF INDICATORS INCLUDED IN LOAN OPERATIONS WITH DIVERSITY  
ELEMENTS, 2011-2016

	Objective / Sub-objective + Diagnosis + Activity + Indicator	Diagnosis + Activity + Indicator	Activity + Indicator	Indicator only
No. of operations	21*	11	22	14
Share of operations with output and outcome indicator(s)	15%	0%	14%	21%
Share of operations with output but no outcome indicator(s)	35%	27%	41%	50%
Share of operations with outcome but no output indicator(s)	45%	27%	41%	50%
Share of operations with at least one DDR	45%	45%	41%	79%
Share of operations with at least one DRR	85%	73%	73%	29%

\*20 are SG and one is NSG.

*Note:* OVE identified eight NSG loans that worked on diversity issues during the evaluation period. Only one of them had Objective/Sub-objective + Diagnosis + Activity + Indicator. The other seven had some isolated element, hence failing to fall in any of the other integration categories.

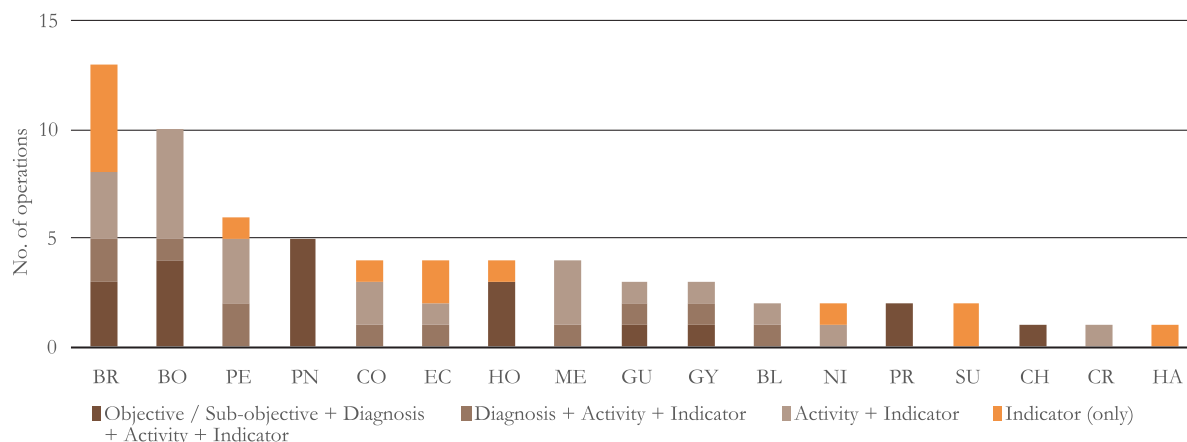
*Source:* OVE, based on Data Warehouse.

Private sector loans that addressed diversity issues during the evaluation period also addressed gender, exhibiting relatively higher degrees of integration in gender. During the evaluation period all eight NSG loans that addressed diversity issues also addressed gender. While most had an indicator or activity integrating diversity considerations, only one had diversity-related objectives or sub-objectives, diagnosis, activity, and M&E. Moreover, fewer than half of the loans that had gender or diversity M&E had indicators that were SMART, often lacking baselines and targets. Three loans incorporated the Bank's Shared Value Approach, which aims at investing in projects that increase financial returns and deliver positive social impact—in these cases, to indigenous peoples and African descendants. However, OVE determined, on the basis of the project documents, that the Bank's proposed value added through the Shared Value Approach is unclear compared to that of the weB and EDGE initiatives.<sup>42</sup>

Countries that included diversity issues in their CSs exhibited varied degrees of integration of diversity elements in their operational portfolios (Figure 3.8). Countries where the Bank has mainstreamed diversity elements through health and education operations, such as Honduras and Panama, tended to exhibit relatively higher degrees of integration of diversity elements in their loans, while countries

that mainstreamed diversity through other sectors usually did so by including indicators (and often activities), rather than objectives or diagnoses. Examples include agriculture projects in Peru and water and sanitation and transportation projects in Nicaragua, which did not provide diagnoses of the gaps facing indigenous populations.

FIGURE 3.8. RELATIVE DEGREE OF INTEGRATION OF DIVERSITY ELEMENTS IN LOAN OPERATIONS (NUMBER OF OPERATIONS WITH SOME DIVERSITY ELEMENT BY COUNTRY), 2011-2016



Source: OVE, based on Data Warehouse.

## D. SUMMARY

As the Bank strengthened its capacity to promote gender and diversity, it increased the number of activities that mainstream these issues—especially loans in gender and TCs in diversity. The share of total loan and TC approvals that had gender elements doubled between 2011 and 2016, when the Bank approved 344 loans and 64 TCs with gender elements. Likewise, an increasing number of CSs have included gender (18 countries’ most recent CSs include gender diagnostics, indicators, or both, and 7 have gender as a cross-cutting issue). The Bank also produced a significant number of gender-related technical notes and guides to facilitate the mainstreaming of gender in its operations, as well as studies, policy dialogues, and strategic partnerships that include gender issues. Similarly, the share of Bank approvals that included some diversity element grew considerably between 2011 and 2016, when the Bank approved 15 loans and 118 TCs with diversity elements. However, only 6 countries include diversity diagnostics or indicators in their current CSs, while 11 include diversity as a cross-cutting theme. Compared to gender, the Bank has focused relatively less on generating knowledge products related to diversity, has conducted relatively few policy dialogues, and has built fewer strategic partnerships.

Bank work in gender was generally aligned with relevant challenges; moreover, the degree to which the average individual lending operation has integrated gender increased, reflecting the improved capacity of Bank sector divisions and their

recognition of the relevance of integrating gender. Bank operations were generally aligned with regional and country challenges in LAC, including efforts to improve women's economic empowerment and health outcomes, and to a lesser extent addressing VAW and improving women's voice and agency. Between 2011 and 2016, the share of operations with gender elements that included a diagnostic, activity, and M&E with and without gender objectives/sub-objectives increased from 33% to 43%. Over time, more sectors, including INE and CSD, have been integrating gender to a relatively higher degree. The relative degree of integration of gender elements is also related positively to the inclusion of gender diagnoses and indicators in the CSs.

Bank operations in diversity were relevant to local challenges, though there was relatively greater focus on indigenous peoples than on African descendants; moreover, the increased number of operations was accompanied by a higher degree of integration of diversity issues over time, although the increase was not as pronounced as that of gender. Operations with diversity elements were relevant to the local challenges, focusing on expanding indigenous communities' access to infrastructure and services—especially water and sanitation, and energy—and human capital development, mainly in the form of health and education. The number of operations that included diversity-related objectives or sub-objectives has increased, though most of the growth in the diversity portfolio is due to an increase in operations that include diversity in one component, M&E indicators. As the Bank focused more on development with identity for indigenous peoples than for African descendants, the increase in the relative degree of integration of diversity may be related, in part, to implementation of the indigenous safeguards policy (which requires, for example, consultations with indigenous communities).



**MINISTRY OF COMMUNITY DEVELOPMENT  
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The Bank support to gender and diversity in its development interventions rely on demand from its country counterparts. Both issues tend to be ranked relatively low among borrowing countries' development priorities (General Perception Survey 2016).

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# 4 Factors Affecting the Level and Degree of Mainstreaming

## A. EXTERNAL FACTORS

The degree of Bank support for gender and diversity depends, in part, on how much borrowing countries prioritize the issues in their Bank activities. Even if the IDB sets targets for the inclusion of gender and diversity in its activities, it must agree with its country counterparts to include these issues, especially in lending operations. Furthermore, strong country demand is necessary for loans to more deeply integrate gender and diversity.

Gender and diversity tend to be ranked relatively low among borrowing countries' development priorities, according to the Bank's 2016 General Perception Survey (GPS). The 2016 GPS received 3,878 stakeholder responses from people across LAC in the public, private, knowledge-producing, and civil society/charity sectors on their opinions of the IDB Group and the development challenges they perceive as most important.<sup>43</sup> The respondents rated gender and diversity as the second least pressing development challenge out of 20 listed, ahead of only tourism.<sup>44</sup> They also rated the cross-cutting themes of "Supporting development of indigenous/afro-descendant peoples" and "Promoting gender equality/empowerment of women" as the least important cross-cutting themes out of 7 listed.<sup>45</sup> Additionally, they rated the IDB Group's contribution to these challenges and cross-cutting themes among the lowest. The survey results show that the IDB works in a challenging environment as it strives to promote gender and diversity.<sup>46</sup>

Given the relatively low priority assigned to these issues, Bank specialists confirmed that it can be challenging to convince countries to include gender and diversity elements in their operations. Team leaders OVE interviewed and surveyed noted that despite the Bank's efforts to promote gender and diversity, it is still difficult to convince many governments to include these issues in their lending portfolio. Among survey respondents, 87% replied that the beneficiary's commitment to gender and diversity issues was helpful in including gender elements in the design of projects. However, only 42% reported that the government representatives they interact with show interest in addressing gender issues, and only 30% that they show interest in

addressing diversity issues.<sup>47</sup> The relative preference for gender, which is also reflected in the Bank's lending portfolio, is likely because it is a factor in all countries in the region, while diversity challenges are concentrated in fewer countries. Nevertheless, it is interesting to note that the sub-region that demonstrated the highest relative degree of integration of gender, Central America, was also the sub-region whose stakeholders rated gender and diversity in the GPS as relatively greater development challenges.

Finally, the Bank may encounter a challenge in engaging governments in this area since it may not always have a natural counterpart (i.e., ministry) for gender and diversity issues. For example, while almost all the countries in the region have gender equality plans, only eight have a gender or women's ministry (ECLAC 2017), and only four have indigenous ministries. The lack of a high-level gender or diversity government agency also makes it a challenge for countries to mainstream gender and diversity across their programs. Also, drawing on the field studies, interviews, and focus group, OVE determined that the gender and diversity skills of PEU personnel are usually low and that most are not receiving adequate training.

## **B. INTERNAL FACTORS**

Aside from the external factors, much of what influences the Bank's support for gender and diversity are its institutional setup and incentive structure. For example, prioritizing gender and diversity within the organization and enhancing the staff's capacity to mainstream these issues has positively affected the Bank's ability to "supply" mainstreamed operations to borrowing countries. However, focusing incentives primarily on the design aspects of operations may not lead to the achievement of results, which in general are difficult to measure.

To assess the internal factors influencing the support for gender and diversity, OVE grouped them into five categories based on good practices identified in the gender and development literature, which we also apply to diversity. Narrowing gender, ethnic, and racial gaps at the country, sector, project, and institutional levels requires a clear understanding of the gaps and of how to address them at each level. It also requires an understanding of the design, sequencing, and implementation of country and sector plans, projects, and institutional policies. The literature on gender and development has identified good institutional practices for supporting gender. According to a summary of the relevant literature (Grown, Nanivazo, and Sejas 2014), the capacity to support gender requires (i) leadership/political commitment; (ii) technical capacity; (iii) embedding a gender approach into business practices; (iv) resource allocation; and (v) accountability and monitoring systems (Box 4.1).<sup>48</sup>

*Box 4.1. Internal factors influencing support of gender and diversity*

**Leadership / political commitment.** Leadership / political commitment refers to the extent to which senior staff champion the promotion of gender equality and diversity in operations and within the institution. It is important to assess whether the rhetoric is matched with specific actions such as the development of clear mandates and policies and mechanisms to hold leaders accountable to specific commitments.

**Technical capacity.** Technical capacity refers to the extent to which the institution develops and maintains sufficient technical capacity. This requires (i) recruiting and retaining gender and diversity specialists in sufficient numbers and with the necessary geographical, sector, and technical skills (e.g., M&E); (ii) providing adequate training on how to narrow gender and diversity gaps; (iii) generating relevant knowledge products; and (iv) sharing best practices.

**Embedding gender and diversity into business practices.** This refers to the explicit adoption of a system of intrinsic and extrinsic incentives<sup>a</sup> aimed to promote a culture to motivate staff or elicit specific staff behaviors to work to narrow relevant gaps through their work and to conduct their lives aware of gender and diversity dynamics.

**Resource allocation.** This refers to the availability of sufficient funds to close the gender and diversity gaps at the country, sector, project, and institutional levels; these funds must be allocated on the basis of specific needs analysis and properly tracked and reported.

**Accountability and monitoring systems.** This best practice refers to the existence of accountability and monitoring systems that capture whether the Bank's operations are progressing adequately and are leading to the narrowing of specific and relevant gender gaps.

<sup>a</sup> Extrinsic motivation is an external form of motivation, stemming from an outside demand (e.g., a supervisor), obligation, reward (money, praise, good grades) or punishment that requires the achievement of a goal. Intrinsic motivation, however, is the internal desire to perform a task because it gives pleasure, develops a skill, or is morally the right thing to do.

While all MDBs have made substantial progress in gender mainstreaming, OVE's comparative analysis indicates that the IDB's institutional arrangements for gender mainstreaming compare favorably to those of the World Bank, Asian Development Bank, and African Development Bank (see [Annex III](#)). First, the IDB has relatively better and more clearly-defined guidelines to help staff mainstream gender in their operational work. Second, IDB's staff training and gender knowledge products appear to be stronger. Third, incentives to address gender issues appear to be stronger in the IDB.

## 1. Leadership/political commitment

Bank staff have responded to senior management's championing of the promotion of gender equality and women's empowerment. Bank leadership makes frequent statements supporting the promotion of gender equality. As part of this commitment, the IDB Group launched a campaign with the slogan "100% Committed to Gender Equality" to provide more visibility to some of the initiatives the Bank is implementing. Staff OVE interviewed generally acknowledged that increasing positive pressure from upper management to promote the Bank's gender agenda is helping to change the Bank's culture. Senior management also makes public statements supporting the promotion of diversity issues, but does so less often.<sup>49</sup> Management and staff recognize the higher prioritization of gender, and management expects that the lessons being learned from gender mainstreaming could be useful if there is a decision to increase diversity mainstreaming.

The targets set by senior management have been positive factors for incorporating gender in the design of Bank activities. As noted previously, the Bank sets clear targets in the GAPs for outputs such as the number of approved CSs and SG loans with GRRs, and the number of direct investment loans in gender equality. The Bank's Corporate Results Framework (CRF) also measures the percentage of lending that is strategically aligned with gender equality and diversity. While these targets have been mostly met,<sup>50</sup> most sector specialists OVE interviewed and surveyed replied that having targets in their divisions was helpful for including gender elements in project design. This result is consistent with the progress report of the Bank's GAP (2014-2016), which found that lending targets were significant factors in determining whether a GRR was included in an SG loan (IDB 2017b).

The mandate to promote gender is clearer and more specific than the one to promote diversity. The approval of the GAPs has created clear responsibilities for implementing specific obligations and activities defined in the gender policy and has improved the quality of indicators with specific, time-bound targets. However, the Bank has not approved similar action plans for diversity, and therefore policy clarity for diversity is lower, responsibilities for implementation remain largely unassigned, and results remain difficult to measure. Currently, the CRF is the only strategic document with a target for diversity, although the target is combined with gender equality (percentage of lending aligned with gender equality and diversity).

## 2. Technical capacity

OVE's portfolio analysis shows that the degree of integration of gender and diversity has increased in divisions that are proactively working to increase their capacity. Aside from the social sector, infrastructure and energy have the highest degree of integration of gender, perhaps a result of their efforts to build capacity. For example, INE has created a gender toolkit to help with gender mainstreaming, and TSP has developed



a gender lab<sup>51</sup> that, according to staff, has helped to develop relevant knowledge for the design and implementation of operations (identification of sector-specific gender gaps, and solutions). Many staff OVE interviewed view the gender lab as a promising way to develop capacity in gender, and other sector divisions have created similar initiatives (e.g., the Competitiveness, Technology, and Innovation Division’s research program on “Gender Gaps in Science, Technology and Innovation in Latin America and the Caribbean”). Given that the Bank has been following a consciously sequential and focused approach to building division-level capacity, the ability of divisions to mainstream gender has not grown in a uniform manner.

At the individual level, IDB staff have been increasing their capacity to mainstream gender and diversity, though their capacity is greater for gender than for diversity. Half of the team leaders OVE surveyed reported that they have received training on gender issues, while only 27% reported the same for diversity. According to the Bank’s data, the average number of staff trained annually between 2014 and 2016 was 1,020 (IDB 2017b). At the same time, team leaders that OVE interviewed and surveyed reported that GDI specialists and consultants hired by their divisions have been helpful in integrating gender and diversity in the design and execution of projects. OVE found that the gender focal points play an important role in their divisions, assisting their peers in identifying ways to mainstream gender in operations, despite their varying levels of knowledge and experience with gender. These collaborations and on-the-job learning have also increased the capacity of staff. However, sector specialists also noted the need for more sector-level expertise on identifying and resolving gender and diversity challenges.

The Bank’s knowledge agenda is also developing staff’s capacity to better understand the gender and diversity gaps in the region and the effectiveness of certain interventions. The Bank’s research department (RES) has produced studies and surveys that include gender elements. RES has undertaken several rigorous studies, some of them in coordination with GDI and other sector divisions, that are setting the basis for a better understanding of gender gaps and dynamics—for example, surveys it conducted in the preparation of its flagship report, *Development in the Americas*, and in its contributions to the social sector’s *Pulso Social* publications. And as noted above, the Bank’s IEs of gender-related interventions have provided evidence to better understand the effectiveness of different approaches in promoting gender equality and women’s empowerment.

### 3. Embedding gender and diversity in business practices

The Bank is making strides in progressively changing the institutional culture and motivating staff to mainstream gender. Senior management’s leadership and commitment to gender mainstreaming, HR policies that promote increasing gender equity in the staff and management,<sup>52</sup> a communication policy that promotes gender issues to Bank staff, and training have all helped sensitize a sizable portion of Bank

staff. Many staff have internalized the desire to help close gender gaps. In the words of many of the specialists and managers interviewed, “gender has become part of our DNA, because we believe that it is the right thing to do and helps development.” Also, many specialists reported that this is the main reason they want to work on gender issues and that they would continue working on them even in the absence of extrinsic incentives such as monetary rewards or recognition, and despite the high transaction costs associated with including gender issues in project design. However, 43% of the survey respondents reported that the inclusion of gender and diversity had high transaction costs. According to the interviews and focus group, these are related to the extra time and effort necessary for their inclusion, lack of funds, and reticence of the Bank’s counterparts.

The Bank has also begun to motivate staff by including gender goals in performance appraisals; however, it is not clear that these goals have made much of a difference. While gender goals are progressively being incorporated in the annual performance evaluation exercise,<sup>53</sup> only 30% of the survey respondents reported that they are included in their performance review. Besides, most specialists who reported to OVE that gender-related goals were included in their performance reviews noted that successful fulfillment of such goals did not contribute to higher performance ratings and promotions. In contrast, 64% of the survey respondents reported that public recognition of superior work in the promotion of gender equality motivated them to include gender elements in the design of their operations.

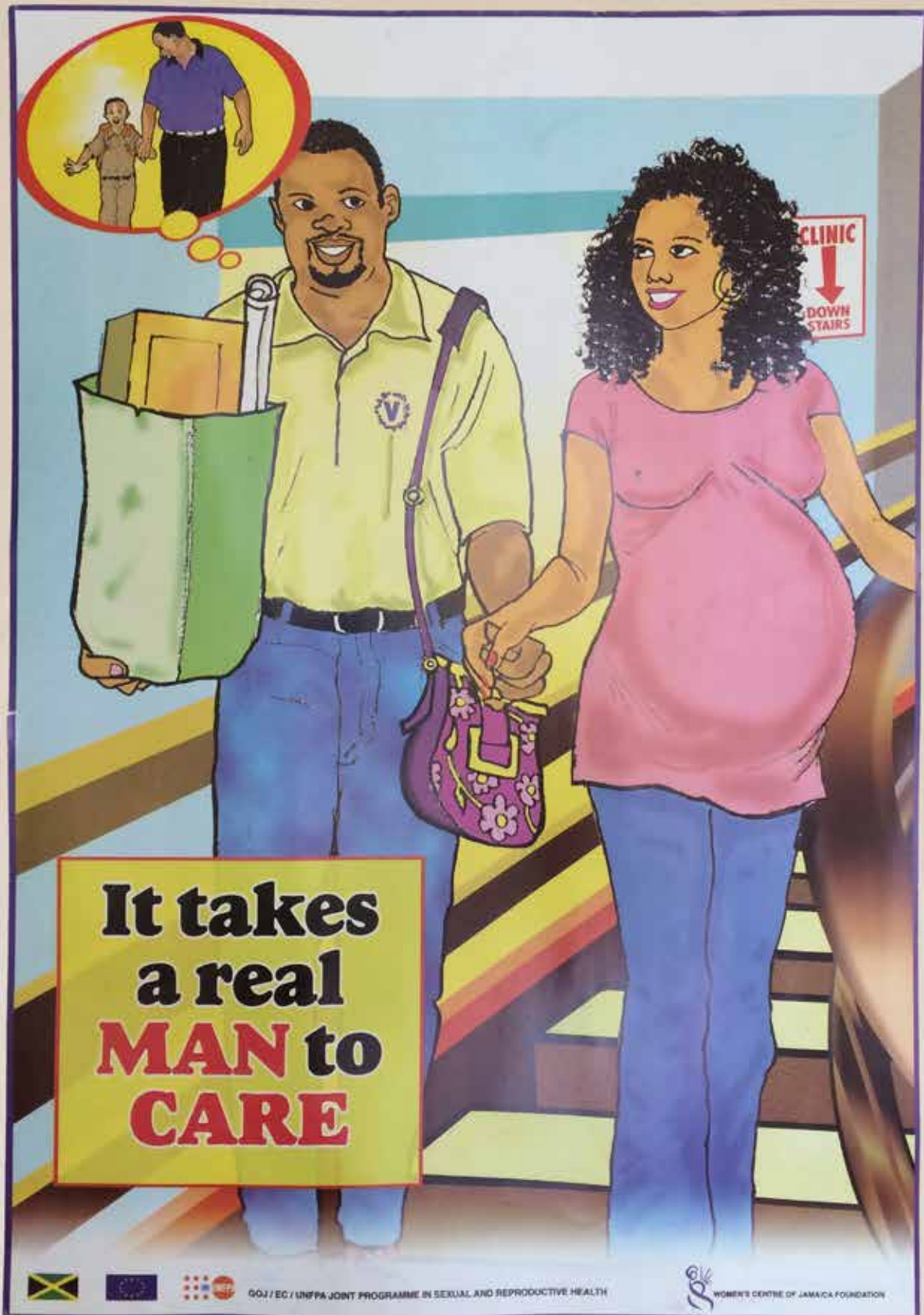
The requirement to include gender equality in the strategic alignment section of the development effectiveness matrix (DEM) has proven to be an important incentive for the promotion of gender mainstreaming. Among the survey respondents, 63% reported that this requirement motivates them to include gender issues in the projects they design. However, most specialists interviewed reported that the process of the DEM approval was becoming a disincentive because (i) SPD personnel do not have expertise in the subject matter and have no uniform criteria when assessing the vertical logic of gender components; and (ii) SPD has focused on the link of gender activities and indicators to the central vertical logic of the project, rather than allowing gender components to have their own vertical logic. For example, many specialists reported to OVE that, to maximize their DEM scores, they had to remove gender elements from the project design (or to include a “low-hanging fruit” instead of focusing on the real gender gaps) since SPD’s demands were too stringent (a baseline for the gender-related results indicators when none was available, evidence supporting causal links, etc.). They further stated that it was frustrating to spend a lot of effort working for the inclusion of gender in the project design, when ultimately they had to drop it because they were unable to meet these demands.

#### 4. Resource allocation

The allocation of resources for hiring gender specialists and consultants and for financing initiatives in some sector divisions to build capacity has fostered deeper integration of gender in operations. Nevertheless, resources for gender and diversity mainstreaming still are not widely available in all divisions. The divisions that have made the most progress in mainstreaming gender<sup>54</sup> have made good use of bilateral and TC funds to support gender mainstreaming,<sup>55</sup> now that the Gender and Diversity Fund no longer exists and its associated multidonor fund has very little funding left. In divisions where progress in mainstreaming has been slower, many specialists report that they regularly lack resources to properly analyze gender gaps for their sectors and projects and to prepare gender components. Vice-Presidency for Countries staff also complained about the lack of resource availability to properly analyze gender gaps at the country and sector levels. In divisions where progress has been slower, several division chiefs noted that they would require more resources to help identify the gender gaps of their sector, find adequate gender interventions, and evaluate their potential impact. Finally, in part because funds dedicated to narrowing gender gaps through Bank operations are not properly tracked and reported, the Bank does not undertake any analysis to determine the resources required at the country, sector, project, and institutional levels to effectively narrow identified gender gaps.

#### 5. Accountability and monitoring systems

The Bank's accountability and monitoring systems emphasize the measurement of inputs and outputs, while little effort goes into capturing outcomes and analyzing whether relevant gender and diversity gaps are narrowed through operations. OVE identified 67 indicators to measure the Bank's upstream work on gender and only 3 institutional indicators to measure overall progress in the implementation of gender projects and/or components.<sup>56</sup> Further, over 70% of the survey respondents stated that they do not systematically disaggregate data by gender in project completion reports (PCRs) and project monitoring reports (PMRs). Additionally, most of the operations that mainstream gender and diversity do so in the form of relatively small activities that are not necessarily aligned with the operation's primary objectives and do not always have outcome indicators to measure their effectiveness. This factor, combined with the low number of operations in the portfolio under review that have closed and have completed PCRs, limits the number of operations in the gender and diversity portfolio whose effectiveness can be measured. The difficulty in measuring results in operations that mainstream gender and diversity is not unique to the IDB; recent reports from the evaluation offices at the World Bank and Asian Development Bank have noted this challenge (WB IEG 2015 and ADB IED 2017).



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a real  
MAN to  
CARE**



# 5 Conclusions and Recommendations

**Since 2010, the Bank’s strategic framework has evolved to strengthen support for gender and diversity, though more emphasis has been placed on gender. These efforts have resulted in a greater number of activities that include these themes—especially loans for gender and TCs for diversity. Individual lending operations that mainstream gender have increased not only in number, but also in the degree to which they integrate gender, reflecting the improved capacity of Bank sector divisions and their recognition of the relevance of addressing gender. The number of loans mainstreaming diversity and the degree to which they integrated diversity also grew over time, although the increases were not as pronounced as those for gender.**

Several external and internal factors affect the level of attention the Bank gives to gender and diversity. The degree to which borrowing countries prioritize gender and diversity is likely an important factor influencing the number of operations that mainstream gender and diversity, and more importantly, the relative degree to which they integrate them. Simultaneously, several internal factors have positively influenced the levels and degree of support for gender and diversity. Despite the increase in number of operations mainstreaming gender and diversity, and an increase in their relative degree of integration, the Bank systems for accountability and monitoring do not adequately follow the implementation and measure the results of this portfolio. Moving forward, it will be important for the Bank to consolidate its capacity for mainstreaming gender and diversity and demonstrate sufficient evidence of the development effectiveness of these activities.



Since 2010, the Bank's strategic framework has evolved to strengthen support for gender and diversity.  
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Drawing on the findings of this evaluation, OVE has the following recommendations for the IDB's continuing support for gender and diversity:

1. Increase the evidence base on the effectiveness of support for gender and diversity, particularly at the operational level, by ensuring there are adequate incentives for team leaders to monitor implementation and evaluate results. The GAP and SFD have been good instruments to understand gender and diversity gaps better and to narrow the focus of priority areas for the Bank's lines of action in gender and diversity. While the Bank has generated some evidence in its knowledge products and recently completed operations, it is important for the Bank to further strengthen its knowledge at the operational level on what works in the prioritized areas.
2. Continue to deepen the dialogue with borrowing countries in these priority areas, drawing on the knowledge accumulated in the Bank and other development institutions. A strong dialogue that draws on reliable evidence will help to increase the number of operations that mainstream gender and diversity and the degree and effectiveness with which they do so.

3. Together with the Board, take a fresh look at how and to what extent the Bank should continue to support diversity in its operations. The Bank has tended to prioritize gender over diversity in recent years, and renewed discussion on the Bank's approach to diversity is warranted. This discussion should consider the Bank's comparative advantage and evidence on the relative effectiveness and the benefits and costs of various approaches to date. It should also consider whether the scope of the Bank's current approach to diversity -- development with identity for indigenous peoples and African descendants -- is adequate or should be expanded to include other types of diversity, such as sexual orientation and persons with disabilities.





- <sup>1</sup> The policies define gender mainstreaming as “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>2</sup> The IDB focuses its diversity activities on indigenous peoples and African descendants because they make up the largest diverse populations in the region and the Bank has institutional commitments to these groups through its policies. However, it recognizes other types of diversity in the region, such as sexual orientation and persons with disabilities.
- <sup>3</sup> Past OVE evaluations relevant to gender and diversity include the following: *Is Gender Being Mainstreamed in Bank’s Projects?* (2010) (RE-373); *Implementation of the Strategy for Indigenous Development: Lessons from the Portfolio Review* (2012) (RE-419); *Mid-Term Evaluation of IDB-9 Commitments: Environmental and Social Safeguards including Gender Policy* (2013) (RE-445-3); and *Mid-Term Evaluation of IDB-9 Commitments: Assessment of the Social Sector Strategy for Equity and Productivity* (2013) (RE-427-3).
- <sup>4</sup> The portfolio included IDB and Multilateral Investment Fund (MIF) loans and TCs that supported the private sector.
- <sup>5</sup> Bolivia, Jamaica, Nicaragua, and Uruguay.
- <sup>6</sup> In several countries in the region, especially in the Caribbean, boys have lower completion and achievement rates in secondary education. On average in LAC, girls attend secondary school at a higher rate than boys (77% vs. 74%) with a completion rate of 47% vs. 39% for boys.
- <sup>7</sup> In some countries, such as Honduras, Belize, and Guatemala, men’s labor force participation rates are double those of women.
- <sup>8</sup> The literature suggests this can be partly related to the fact that despite representing over 61% of the region’s college graduates, women represent only 30% of graduates in science, technology, engineering, and math fields (UNESCO/UIS).
- <sup>9</sup> Factors include less access to finance, lower rates of land and property ownership, time and mobility constraints due to domestic obligations, and less access to training and business services.
- <sup>10</sup> This is based on the Femininity Index of Poor Households (ECLAC), which compares the percentage of poor women between the ages of 20 and 59 with poor men in the same range.
- <sup>11</sup> The maternal mortality rate varies greatly across LAC: it is three times greater in the Caribbean than in the rest of the region.
- <sup>12</sup> While women make up on average 50% of the region’s public civil servants, they occupy only 20% of upper management positions (Ernst and Young 2013). In the region’s publicly traded companies, women occupy only around 9% of executive positions and 5% of chief executive positions (Flabbi, Piras, and Abrahams 2016).
- <sup>13</sup> The full extent of exclusion of indigenous peoples and African descendants in the region is not completely understood because of the lack of reliable data disaggregated by race and ethnicity; however, empirical evidence shows a significant socioeconomic gap between these populations and non-indigenous non-African-descendant populations.
- <sup>14</sup> LAC has around 45 million indigenous people, representing 8% of the region’s total population (ECLAC 2014). African descendants represent approximately 21% of the region’s population (ECLAC 2016). Estimates of the population of African descendants in Latin America vary across international institutions. The variation is directly related to the primary source of data and the estimation methods used, which in many cases are not validated by the national statistical institutions.
- <sup>15</sup> Although regional data disaggregated by race and ethnicity are hard to find, studies show that maternal mortality among indigenous women in the region is as much as three times higher than the regional average (Cordero Muñoz 2010). Indigenous peoples present “disproportionately high levels of maternal and infant mortality, malnutrition, cardiovascular disease, HIV/AIDS, and other infectious diseases such as malaria and tuberculosis” (Gender and Diversity SFD 2017). Studies for Brazil, Colombia, and Ecuador shows a similar reality of maternal mortality among African-descendant women.

- <sup>16</sup> This is due to less professional care for indigenous women giving birth, less access to vaccinations, and lower rates of treatment for childhood diseases.
- <sup>17</sup> Primary school completion rates for indigenous children are well below those of non-indigenous children in the region—from 9 percentage points below in Bolivia to almost 44 percentage points below in Panama (IDB 2017 calculations based on National Survey of Household Living Standards [Mexico]; National Survey of Living Conditions [Guatemala]; Survey of Living Standards [Panama]; Survey of Living Conditions [Ecuador]; National Household Survey [Peru]; and Household Survey [Bolivia]).
- <sup>18</sup> The Third Regional Comparative and Explanatory Study (TERCE) is a large-scale study of learning achievements applied in 2013 by UNESCO in 15 countries—Argentina, Brazil, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, and Uruguay—and the Mexican state of Nuevo León.
- <sup>19</sup> In Brazil, African descendants earn an estimated 53% less than the rest of the population, and 70% of Brazilian families living in extreme poverty are African descendant (IBGE 2013). In Colombia, the United Nations Development Programme has estimated that the rate of extreme poverty in municipalities where African descendants represent 30% or more of the population is 43.1%, compared to 27.8% in the general population.
- <sup>20</sup> Only four countries have poverty data disaggregated by race (Brazil, Ecuador, Peru, and Uruguay). These figures show African descendant poverty rates ranging from 11% in Uruguay to 42% in Ecuador (ECLAC 2014).
- <sup>21</sup> The policy applies to the Multilateral Investment Fund and the IDB sovereign and non-sovereign guarantee windows, which included the Structured and Corporate Finance and Opportunities for the Majority Departments, which in 2016 were merged into the Inter-American Investment Corporation (IIC).
- <sup>22</sup> The Gender and Diversity Fund is now part of the Social Core Fund, while the Multi-Donor Gender and Diversity Fund remains.
- <sup>23</sup> The 2014-2016 GAP Progress Report identified seven challenges to supporting gender: (i) measuring the concrete results of agenda setting and partnership efforts; (ii) increasing the percentage of CSs that include gender-related analysis, actions, and results; (iii) continuing to expand and improve the quality of gender mainstreaming in the design of financial operations; (iv) translating good project design into concrete results in project execution; (v) expanding the portfolio of direct investments in gender equality; (vi) systematically tracking the application of the gender safeguards in IDB financial operations; and (vii) closing gaps in knowledge about what works to promote gender equality across sectors, and disseminating knowledge to Bank staff and decision makers in the region.
- <sup>24</sup> The lines of action are as follows: expand access to and improve the quality of public services for women and children; expand economic opportunities for women; strengthen women’s voice and agency; expand access to and improve the quality of public services for indigenous peoples; support the economic empowerment of indigenous peoples and Afro-descendants; and strengthen the governance of indigenous peoples and Afro-descendants.
- <sup>25</sup> GN-2588-4 notes that characteristics such as gender, race, and ethnicity play a significant role in different aspects of inequality in the region.
- <sup>26</sup> AB-3008 established “gender equality and diversity” as one of the institution’s three cross-cutting themes.
- <sup>27</sup> The Corporate Results Framework 2016-2019 included a broader set of indicators to measure the Bank’s contribution to gender equality, such as maternal mortality rate, formal employment of women, women beneficiaries of economic empowerment initiatives, and disaggregating other indicators by sex.

- <sup>28</sup> The Bank's work on African descendants has focused on contexts in which African descendants suffer exclusion because of their racial or ethnic status or origin—typically not in the English-speaking Caribbean.
- <sup>29</sup> According to the Guidelines, GN-2386-8 was to be implemented in all LAC countries except Jamaica, Haiti, Trinidad and Tobago, Barbados, The Bahamas, and Uruguay. Specifically, the guidelines state that the country divisions will apply the procedures for implementing OP-765 “for countries with indigenous populations of significant size, diversity, or vulnerability.”
- <sup>30</sup> GDI and the Office of Strategic Planning and Development Effectiveness (SPD) have undertaken different methodologies across the evaluation period. GDI's classification analyzes gender exclusively (not diversity), while SPD started to include diversity only in 2016. Moreover, neither of the available methodologies provides a uniform assessment of the relative degree of the integration of gender or diversity elements in Bank operations through the entire evaluation period: while GDI tracks the inclusion of gender elements at different stages of project design without verifying the vertical logic between them, SPD focuses on evaluability and changed its methodology in 2016. See [Annex I](#).
- <sup>31</sup> OVE identified the relevant gender and diversity portfolio across the entire IDB portfolio of operations by aggregating the operations classified by various Bank departments. OVE started with the Bank's entire loan and TC portfolio for the evaluation period (2011-2016) and selected all operations previously identified by GDI as having any gender or diversity element (objective, sub-objective, diagnosis, activity, M&E). To identify any missing operations, OVE then cross-checked these operations with relevant documents such as the GAP Reviews, which provide operations identified by Structured and Corporate Finance Department (SCF), Opportunities for the Majority (OMJ), Inter-American Investment Corporation (IIC) for 2016, and MIF, and other Bank documents, such as SPD's Annual Business Reviews. As a result, OVE identified the universe of loan and TC operations with—potentially—some gender and/or diversity element.
- <sup>32</sup> OVE's analysis provides an understanding of how the various sector divisions' operations have been integrating gender and diversity and which gender and diversity gaps they have addressed. Given the challenges with respect to measuring the effectiveness of the gender and diversity portfolio, the portfolio review provides insight into the potential impact of the operations based on their relative degree of integration, which we discuss in greater detail later in this chapter.
- <sup>33</sup> During the evaluation period the Bank Group had four windows through which to provide NSG financing to the private sector: SCF, OMJ, IIC, and the MIF. In January 2016, SCF and OMJ merged with the IIC.
- <sup>34</sup> The number of loan operations integrating gender elements increased from 42 in 2011 to 56 in 2016.
- <sup>35</sup> The number of approved loans that included some diversity element doubled from 8 in 2011 to 16 in 2016.
- <sup>36</sup> *Ciudad Mujer* in El Salvador in 2011 and 2015 (ES-L1056 & ES-L1092), Itau Unibanco Women-Owned MSME Partnership in Brazil in 2015 (BR-L1437), and *Ciudad Mujer* in Honduras in 2016 (HO-L1117). Moreover, GDI double-booked five operations with IFD (GY-L1042, PR-L1077, BR-L1343, BR-L1417, and CH-L1105) and two with CSD (BO-L1079 and BR-L1412).
- <sup>37</sup> The CS for the Bahamas is the only one that does not include gender issues.
- <sup>38</sup> In the past years the MIF has approved over US\$34 million in 44 grants with a focus on addressing gender gaps. By complementing private sector efforts and creating relevant local partnerships, the MIF has developed niche expertise in relevant gender issues in the region: entrepreneurship and access to services.
- <sup>39</sup> This is consistent with the experience of other development institutions.

- <sup>40</sup> As part of the portfolio review, OVE identified gender-related and gender-disaggregated result indicators in each loan operation reviewed, adopting the following definitions stated in the “Implementation Guidelines for the Operational Policy on Gender Equality in Development” (2013): A gender-disaggregated result (GDR) refers to data (statistics, interview results, and other basic information) that clearly distinguishes between data applicable to women and data applicable to men. This type of indicator does not measure changes towards gender equality or women’s empowerment by itself. A gender-related result (GRR) is an output, outcome, or impact that contributes towards gender equality or women’s empowerment.
- <sup>41</sup> OVE adopted a definition of diversity-related results and diversity-disaggregated results that is analogous to the Bank’s definition on gender results.
- <sup>42</sup> EDGE (Economic Dividends for Gender Equality) is a certification private sector companies can obtain to show they offer fair and mutually beneficial workplaces for women and men. IDB’s Shared Value Approach is an initiative seeking to achieve positive social impacts through systematic, business-aligned, and thus sustainable investments.
- <sup>43</sup> The share of respondents from each sector was 48% public, 20% private, 12% knowledge-producing, and 18% civil society/charity.
- <sup>44</sup> The highest-rated development challenges were citizen security and justice, education/early childhood development, social protection/poverty, and water and sanitation.
- <sup>45</sup> The highest-rated cross-cutting themes were strengthening government effectiveness and improving services to citizens
- <sup>46</sup> It should be noted that some highly-rated challenges and themes, such as education, social protection, and citizen security and justice, have important dimensions related to gender and diversity. Furthermore, the low rankings for gender and diversity are relative to other challenges and do not necessarily indicate that governments find them unimportant in absolute terms.
- <sup>47</sup> One focus group participant commented that “I have had to lead projects in countries where government officials laugh at my face when I mention gender and diversity, while in others they welcome my comments with open arms.”
- <sup>48</sup> [Annex III](#) presents more detailed definitions of the factors and demonstrates how the IDB compares to the World Bank, Asian Development Bank, and African Development Bank in these five factors.
- <sup>49</sup> Examples include statements honoring the International Day of the World’s Indigenous Peoples and the International Decade for People of African Descent (2015-2024).
- <sup>50</sup> According to the *Three-Year Progress Report on the Implementation of the Operational Policy for Gender Equality in Development and the Gender Action Plan for Operations, 2014-2019*, the Bank met or exceeded 18 of 23 indicators that included a target.
- <sup>51</sup> The Transport Gender Lab (RG-T2864) is a TC that seeks to generate knowledge about the design, implementation, and monitoring of initiatives, activities, and studies in favor of gender equality in the transport sector through joint work and exchange of experiences. As part of the lab, TSP has three projects in Bolivia, Nicaragua, and Paraguay that include pilots to increase women’s capabilities in the operation of heavy machinery to increase their employment in construction. The division is also studying harassment in public transport and its impact on female ridership.
- <sup>52</sup> For example, the Ninth General Capital Increase set a clear target for increasing the percentage of women among mid- and senior-level staff and upper management. This indicator is included in the CRF and currently has a target of 43%. These efforts helped the Bank earn EDGE certification in 2017. The Bank has not set targets for increasing the ethnic and racial diversity of its staff.
- <sup>53</sup> Gender and diversity have been included in the Bank’s performance review process since the approval of the Diversity and Inclusion Framework (GN-2684) in 2012, and the most recent GAP (2017-2019) proposes to include “recognition of operational work that supports gender equality in employee performance reviews.”
- <sup>54</sup> For example, TSP, WSA, and Institutional Capacity of the State.



- <sup>55</sup> These include the Spanish Water Fund, IDB's Regional Public Goods, and grant resources leveraged by the Bank from countries such as Canada. IDB and PEU staff also reported that Climate Investment Funds, which require gender-based analysis in the country's investment plan, have also been a source of financing of gender activities in climate-related projects.
- <sup>56</sup> OVE reviewed all Bank strategic and policy documents on gender and diversity (Gender Policy, GAPs, and SFD) and identified 18 institutional objectives and 70 indicators for gender and diversity. Not all indicators have targets and are being monitored by the Bank. The three indicators measuring implementation of gender projects and/or components are included in GAP (2017-2019): (i) % of PMRs for SG loans reporting on gender-related results included in their results matrix; (ii) % of SG loan PCRs that include specific gender-related results in their results matrix that report satisfactory results for actions to foster gender equality; and (iii) % of GRRs included in SG loan results matrices that are achieved during project execution.



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