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Implementation Guidelines for the Operational Policy on Gender Equality in Development

GENDER AND DIVERSITY DIVISION. SOCIAL SECTOR



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GENDER AND DIVERSITY DIVISION
INTER-AMERICAN DEVELOPMENT BANK

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Gender Portal

Abbreviations

DEM	Development Effectiveness Matrix
DEO	Development Effectiveness Overview
ERM	Eligibility Review Meeting
ESIA	Environmental and Social Impact Assessment
ESMP	Environmental and Social Management Plan
ESMR	Environmental and Social Management Report
ESR	Environmental and Social Review
ESW	Economic and Sector Work
GBV	Gender Based Violence
GCI-9	Ninth General Capital Increase
GAP	Gender Action Plan 2011-2013
GDF	Gender and Diversity Special Program
IDB	Inter-American Development Bank
INE/RND	Environmental, Rural Development & Disaster Risk Division
IPWG	Inter-departmental Gender Policy Working Group
LP	Loan proposal
M&E	Monitoring and Evaluation
MGD	Multi Donor Gender and Diversity Fund
MIF	Multi-lateral Investment Fund
OC	Ordinary Capital of the Bank
OPC	Operations Policy Committee
OPUS	Operations Update System
PCR	Project Completion Report
PMR	Project Monitoring Report
POA	Plan of Acquisitions
POD	Proposal for Operation Development
PP	Project Profile
PSR	Project Status Report
QBR	Quarterly Business Review
QRR	Quality and Risk Review
SCL/GDI	Social Sector/Gender and Diversity Division
SMART	Specific, Measurable, Achievable, Relevant and Time-bound
SME	Small and Medium Enterprises
SPD	Office of Strategic Planning and Development Effectiveness
SRH	Sexual and Reproductive Health
STEM	Science, Technology, Engineering, and Math
TC	Technical Cooperation
VAW	Violence Against Women
VPC	Vice Presidency for Countries
VPP	Vice Presidency for Private Sector and Non-Sovereign Guaranteed Operations
VPS	Vice Presidency for Sectors and Knowledge
VPS/ESG	Environmental Safeguards Unit

Table of Contents

I.	Introduction	2
	A. Background	2
	B. Objectives	2
	C. Directives of the Gender Policy	3
II.	Gender-Related Results and Strategic Gender Objectives	4
	A. Defining Gender-Related Results	4
	B. Strategic Gender Objectives	4
III.	Gender in Country Strategies and Programming	5
	A. Updating Country Knowledge: Preparation of Analytical Work and Sector Dialogues	5
	B. Country Strategy Preparation and Implementation	6
IV.	Integrating Gender into Bank Operations	7
	A. Integrating Gender into Project Preparation And Incorporating Gender-Related Results	8
	B. Integrating Gender into Execution and Supervision Of Operations	14
	C. Integrating Gender into Project Closing and Evaluation	15
V.	Application of Gender Safeguards	17
VI.	Monitoring the Gender Policy	19
	A. Monitoring Gender-Related Results in Loans, Grants, and Country Strategies	19
	B. Sex-Disaggregated Indicators	20
	C. Other Institutional Indicators for Measuring Gender Equality and Women's Empowerment in IDB Operations	21
VII.	Annexes	22

I. INTRODUCTION

A. Background

1.1 The IDB's *Operational Policy on Gender Equality in Development* ("Gender Policy") was approved in November 2010 and entered into effect in May 2011. The Gender Policy aims to improve the Bank's ability to support its member countries' goals and commitments to gender equality and women's empowerment¹. It commits the Bank to undertake both proactive and preventive actions, and sets out monitoring mechanisms.

1.2 To facilitate policy implementation, the Gender Policy requires the development of periodic action plans as well as Gender Policy Implementation Guidelines. While the action plans outline specific actions the Bank will pursue during a given period of time², the Implementation Guidelines provide general technical guidance on integrating a gender focus into the IDB's interventions and corporate monitoring. The content and structure of these guidelines are directly informed by the Bank's experiences and lessons learned during the implementation the first Gender Action Plan for Operations (GAP), 2011-2013.

1.3 These overarching guidelines will be complemented by sector-specific technical guides that offer concrete, sector-specific, operational guidance on integrating gender into Bank interventions. Additionally, gender will be mainstreamed into the sector-framework documents being developed by IDB operational divisions.

B. Objectives

1.4 **General Objective:** These Implementation Guidelines seek to facilitate the implementation of the Gender Policy directives by providing IDB staff with guidance on how to

integrate the promotion of gender equality into IDB interventions and corporate results. These guidelines offer criteria and basic tools for systematically assessing the potential contribution of Bank interventions' towards gender equality, incorporating specific actions to strengthen this contribution, and monitoring and evaluating results.

1.5 The **Specific Objectives** of the Implementation Guidelines are to:

- i. Define and guide the development of gender-related results derived from gender mainstreaming components of projects or direct investments in gender equality and women's empowerment³;
- ii. Provide guidance for the integration of a focus on gender equality and women's empowerment into country strategies and programming;
- iii. Provide a practical guide for integrating gender into Bank projects⁴;
- iv. Offer criteria for identifying and addressing potential risks of negative impacts or gender-based exclusion in the Bank's operations (gender safeguards);
- v. Define the corporate processes for monitoring and evaluating Gender Policy implementation and results.

1.6 The Gender Policy is cross-cutting in its scope, applying to all sectors of Bank investments and initiatives. While it is safe to assert that gender issues are almost always relevant for operations that are population-based and have direct beneficiaries or that aim to strengthen institutional capacity, the *a priori* definition of operations or subsectors for which gender is "relevant" is not recommended. Instead, this guide offers guiding questions for the analysis of relevant gender issues that can lead to the determination of whether they are relevant and a priority.

1.7 These guidelines mirror the specific objectives listed above, starting by defining gender-related results which need to be achieved in order to meet the objective of the Gender Policy. Throughout the document specific mandates of the Gender Policy are quoted followed by sections providing guidance on the implementation of these mandates.

C. Directives of the Gender Policy

1.8 Direct Investment: Direct investments are projects (loans, investment grants, TCs) that have as their primary objective the promotion of gender equality or women's empowerment. They can make this contribution by addressing strategic gender objectives⁵, generating new knowledge or building institutional capacity to enhance value added in this area. Through the development of gender-sensitive country strategies and sector analytical work, the Bank can help borrowing member countries to identify priority areas for direct investment operations to be included in IDB programming (see Section III: Gender in Country Strategies and Programming).

1.9 Gender mainstreaming: Gender mainstreaming is the process that seeks to identify and address gender equality issues, including the differential needs of women and men, in the design, implementation, monitoring, and evaluation of the Bank's interventions. The Gender Policy calls for the Bank to actively seek opportunities to mainstream gender issues in its development interventions and to incorporate

specific actions to address them (see Section IV for guidance for integrating gender in Bank interventions). The responsibility for gender mainstreaming lies with project teams, but there are a variety of resources - including support from staff and consultants of the Gender and Diversity Division (SCL/GDI) - that project teams can call upon when integrating gender (see Annex 1: Gender Mainstreaming and Direct Investment Resources).

1.10 Gender Safeguards: This is the process through which the Bank identifies and addresses potential adverse impacts for women and men and risks of exclusion based on gender. The Gender Policy commits the Bank to screen for gender-based risks, and this screening is included within the Bank's environmental and social review of projects. As part of this process the Bank has committed itself to seek the equitable participation of women and men in consultation processes, recognize women's rights across different cultural or ethnic contexts, and comply with applicable legislation relating to equality between men and women (see Section V for guidance on gender safeguards).

1. For a definition of key gender equality concepts see Annex 6.

2. Specific targets for Policy monitoring indicators are not part of these guidelines since, if developed, they would be defined in the Gender Action Plans.

3. See Section C for definitions of these terms.

4. Refers to all IDB loans, grants (including investment grants and technical cooperations), and guarantees

5. See section II.A for more information on strategic gender objectives.

II. GENDER-RELATED RESULTS AND STRATEGIC GENDER OBJECTIVES

2.1 Results matrices are a key tool for management of results in country strategies and Bank projects. The Gender Policy emphasizes the importance of gender-related results by tracking their inclusion in the results matrices of Bank country strategies, loans, and technical cooperation grants (see Section VI for more information on the indicators for monitoring the Gender Policy). This section provides a definition of gender-related results and lists six strategic gender objectives—and respective sub-objectives—which are both of particular importance for gender equality in the region and where the IDB has a comparative advantage.

A. Strategic Gender Objectives

2.2 When setting priorities in IDB country strategies and operations, there are six strategic gender objectives that are both of particular importance for gender equality in the region and for which the IDB is well-placed to respond. These

objectives (and corresponding outcomes) can serve as a guide for country strategy and project teams seeking to identify important gender equality issues they may want to address (see Annex 2 for a list of outcomes /indicators corresponding to each objective).

2.3 Note that these objectives can be attained both through direct investments and by mainstreaming gender into the IDB's development interventions.

B. Defining Gender-Related Results

2.4 A gender-related result is defined as an output, outcome, or impact that contributes towards gender equality or women's empowerment.

2.5 Gender-related outputs list separate inputs, activities and immediate results of project activities that seek to promote

Strategic Gender Objectives	Empower women economically
	<ul style="list-style-type: none"> • Increase women's access to quality jobs and economic opportunities • Support the growth of women-owned businesses and female entrepreneurs
	Reduce violence against women
	<ul style="list-style-type: none"> • Prevent violence against women (including sexual violence, physical violence and femicide). • Improve law enforcement's capacity to manage VAW cases • Expand access to VAW support and services
	Improve sexual and reproductive health
	<ul style="list-style-type: none"> • Increase accessibility of gender-sensitive, culturally appropriate, and quality sexual and reproductive health services (including maternal health) • Improve young men and women's ability to make informed decisions about their sexual and reproductive health
	Reduce gender inequalities in education
	<ul style="list-style-type: none"> • Increase gender-sensitivity in school teaching strategies and curricula • Increase gender equality in school attendance for boys and girls (particularly for indigenous girls and boys in Central America and the Caribbean) in primary, secondary, and tertiary education
	Increase women's participation in decision-making
	<ul style="list-style-type: none"> • Increase women's participation in public and private sector leadership • Improve women's participation in consultation and decision-making at multiple levels
	Reduce the burden of caring on women
	<ul style="list-style-type: none"> • Improve individual care systems for children and seniors/adults • Support the equal distribution of household and child care duties between men and women

gender equality or redress gender inequalities by targeting women beneficiaries, women-owned businesses or women-headed households. Women-focused services (e.g. day care centers, centers to address violence against women, maternal health clinics) or men-focused services (e.g. activities seeking the retention of at-risk young men in school or promoting the involvement of men in caring for children) incorporating a gender perspective are considered gender-related outputs, as are the results of these activities (such as number of women or men participants). Other examples of gender related outputs are curricula or training initiatives with a gender perspective.

2.6 A gender-related impact/outcome lists separate long term (impact) or short term (outcome) changes in development results for women and men beneficiaries or effects that capture improvements in gender equality, reduce women or men's barriers to access project benefits, and/or promote equitable gender norms and behaviors (e.g. decrease in the rate of intimate partner violence, increases in the revenues of women-owned businesses, increases in proportion of women holding land titles, and decreases in the adolescent pregnancy and maternal mortality rates).

III. GENDER IN COUNTRY STRATEGIES AND PROGRAMMING

Monitoring Indicator for the Gender Policy

- Number and % of country strategies that include gender-related results in their results matrix

Following the Policy

"The Bank will conduct studies on specific gender issues to promote this subject in dialogue between the Bank and the borrowing countries. If gender is included as a specific priority area for the Bank and government in the respective country strategy, the analysis performed will inform the programming process in order to identify interventions for direct investment.... The Bank will seek out opportunities to include gender issues in sector studies that support the preparation of country strategies"

Art. 4.7-4.12

3.1 As the roadmap for the Bank's strategic approach with member countries, the inclusion of gender into Country Strategies and country programming is vital to improve gender mainstreaming in IDB interventions and promote direct investment in gender equality.

A. Updating Country Knowledge: Preparation of Analytical Work and Sector Dialogues

3.2 During the preparation of sector studies and country analytical work, the IDB has the opportunity to analyze strategic gender issues. The goal of including gender issues in these studies is twofold: to facilitate the integration of gender issues across the areas of Bank investment in the country

and to identify opportunities for direct investments in gender equality or women's empowerment (for a list of key country specific indicators on strategic gender objectives see Annex 3: Gender At-A-Glance: Country-level Indicators on Gender Equality). The analytical work for country strategies (background studies, policy notes, sector notes, and evaluations) can take one of two forms:

- Stand-alone analytical work focused on one or more gender issues:** These "stand-alone" sector or policy notes can assess existing policies and programs from a gender perspective, as well as address the strategic gender objectives outlined in 2.4 above to provide policy options and recommendations for Bank direct investment operations.

BOX 1: Nicaragua Tourism Sector Note (2012) Example

The Nicaragua Tourism Technical Note was prepared by INE/RND with inputs from SCL/GDI to inform the preparation of Nicaragua's country strategy for 2012-2017; gender is a cross-cutting theme throughout the sector note. The note identifies key benefits associated with the expansion of the tourism sector in rural communities, including a potential reduction in poverty and inequality. Specifically, it states that the tourism sector has the potential to generate profound effects on gender equality because it traditionally employs more women than men, helping decrease income inequality between the sexes. The note cites challenges to the expansion of the sector, such as lack of investment capital, business skills training and technological solutions for tourism micro-enterprises, which are largely owned by women. It offers specific recommendations to increase women's participation in the sector, such as a training that focuses on women entrepreneurs and workers, and strengthening the regulatory framework to provide incentives to microenterprises.

- ii. **Mainstreaming gender into sector-specific analytical work:** Sector notes can include a gender analysis of the relevant sector issues and existing policies, and integrate a gender perspective into proposed policy recommendations. Country strategy teams and specialists developing sector notes can coordinate with GDI in order to ensure that gender work is mainstreamed into sector notes and background studies (see Box 1 for a good practice example).

B. Country Strategy Preparation and Implementation

3.3 Country Strategy Document: A country strategy document can be considered a best practice from the Gender Policy perspective if it contains all of the following:

- i. Gender issues identified in the Country Context (for a list of potential indicators see Annex 3: Gender Equality Country-level Indicators);
- ii. Strategic gender objectives are identified or gender issues mainstreamed into the Priority Areas of Bank Support; and
- iii. Gender-related results in the Country Strategy results matrix (for a list of possible gender-related results see Annex 2);

3.4 The inclusion of a list of key country specific indicators on strategic gender objectives (see Annex 3: Gender At-A-Glance) in the Table of Economic and Social Indicators provides a good panorama of gender issues in the country, although it is not a requirement to meet the best practice standard.

3.5 Country Dialogue: In order to promote the inclusion of gender in country strategies, country teams should highlight the importance of gender issues identified in analytical work during dialogue with country governments. Additionally, country strategy teams and partner government agencies should ensure that the country strategy dialogue and the Civil Society Consultation Plan include key gender-related stakeholders like NGOs, ministries, private sector companies, and civil society organizations that focus on women's empowerment and gender equality. As mandated by the Policy, equitable and effective participation of women and men, including these organizations, should be included in the consultation process of every country strategy.

IV. INTEGRATING GENDER INTO BANK OPERATIONS

Following the Policy

“Gender equality mainstreaming will be applied systematically in all Bank development interventions. The Bank will require an analysis of its interventions’ potential contribution to gender equality. When the analysis so indicates, the Bank will incorporate specific actions to strengthen that contribution.”


Art. 4.13

4.1 The objective of this section is to provide IDB staff with a practical guide for addressing gender throughout the project cycle of Bank operations. While the focus is on mainstreaming, direct investment operations will need to follow

a similar process and address similar questions. This section offers guiding questions that project teams should ask themselves at different phases of the project cycle in order to determine and address relevant gender issues⁶ (see Figure 1).

FIGURE 1: Integrating Gender in the IDB Project Cycle

Gender Mainstreaming in the Project Cycle			
	Preparation & Approval	Execution & Supervision	Closing & Evaluation
Project Docs	PP, ESR, POD, LP, DLGP	Operations Manual, POA, LRR, PMR, PSR	PCR, Project Evaluation, XPSR
Revision Instances	ERM, QRR, OPC	Supervision Missions	QRR
Gender Mainstreaming and Safeguards Checklist	1. Does the project present opportunities to improve gender equality? 2. Have gender-based risks been identified? 3. Have activities been designed to promote gender equality/or mitigate gender risks? 4. If gender components and activities are included, do they have assigned resources listed in the project budget? 5. Will the executing agency have the capacity to implement gender components? 6. Does the project include gender-related results in the results matrix? 7. Is there equal participation in project consultations?	1. Are gender activities and components progressing as planned? 2. If there are gender-related results in the results matrix, are they being reported on in the PMR/PSR? 3. Are project indicators showing any problems? 4. If mitigation measures for gender-based risks were included in the ESMR, are they being implemented?	1. If gender related-results were included in the project, to what extent have these objectives been met? 2. Have there been any unexpected or unintentional gendered effects of the project/policy? 3. Does the project evaluation analyze results for women and men?


Gender-Related Results

6. The Multilateral Investment Fund (MIF) uses its own set of guidelines for gender mainstreaming: the Gender Integration Toolkit.

Monitoring Indicator for the Gender Policy

- Number and % of financial operations that include gender-related results in their results matrix.
- Number and % of technical cooperation and grants that include gender-related results (directly or mainstreamed) in their results matrix⁷

Following the Policy

“The Bank will **require an analysis of the relevance of gender issues** during preparation of its operations. Where the **analysis so indicates, it will ensure that concrete actions to address priority issues** and measures to facilitate implementation are incorporated.”

Art. 4.13b

A. Integrating Gender into Project Preparation and Incorporating Gender-Related Results

4.2 The design phase is pivotal for integrating gender into an operation since the gender analysis undertaken in this phase should provide the basis for integrating gender throughout the project cycle.

4.3 **Systematic Gender Analysis of Bank Operations:** All Bank interventions (including loans, grants, and ESWs) regardless of sector, type, and size should conduct a gender analysis, which is the responsibility of the project team. Gender analysis identifies the gender dimensions of any given issue or intervention by assessing the differences in gender roles and available opportunities for men and women. Depending on the intervention and context, a gender analysis can take various forms, ranging from a basic desk review by the project team, inclusion of gender analysis within key consultancies, studies supporting project design, or an in depth study by a specialized consultant⁸. When additional resources or expertise are needed for gender analysis studies/consultants, project teams can include gender specialists as team members or develop operational support TCs financed by trust funds (see Annex 1 for more information).

4.4 The main goal of gender analysis is to provide quantitative and qualitative data in order to understand the gender-specific nature of the problem—including women’s and

men’s different needs and priorities—and to assess an intervention’s potential contribution to gender equality as well as to identify any gender-based risks. Gender analysis should seek to assess gender issues both at the level of the affected or intended beneficiary population as well as at the institutional level. Generally speaking, gender issues are more apparent in projects with direct beneficiaries; and those focusing on institutional reforms and without direct beneficiaries may find the issues less apparent. In all cases, the gender analysis should answer, at a minimum, the questions presented below in Table 1.

4.5 Once these questions are answered, team leaders must ask themselves: “so what?” In other words, the analysis must not merely list gender issues and disparities but also identify the implications for project design. Team leaders should use the gender analysis to develop relevant proactive activities which contribute towards achieving gender equality (by closing identified gaps or removing barriers) and/or define preventive measures to prevent or mitigate gender-based risks. For an example, see Box 2.

4.6 **Gender Mainstreaming in Project Components and Activities:** Gender issues can be mainstreamed into project components or developed as stand-alone gender-equality components (see Box 3), depending on the context and needs identified by the gender analysis. The operations manual for SG loans is a good place to specify activities that promote gender equality, in particular activities re-

7. The IDB nomenclature for technical cooperation grants has evolved since the approval of the Gender Policy so that technical cooperation grants are now split in three categories: Operational Support (OS), Client Support (CS), or Research and Dissemination (RD).

8. Project teams should also undergo a gender analysis throughout execution and evaluation, even if one was not carried out in design, but the Gender Policy mandates that at least an analysis be undertaken in the design phase.

TABLE 1: Key Questions for a Gender Analysis**1. Does the problem/issue under analysis affect women and men differently? If so, how and why?**

- What are the context-specific differences in gender roles, responsibilities, needs, and available opportunities of men and women regarding the issues addressed by the project?
- Will women and men benefit equally from the results of the intervention?
- Are there any gender-specific barriers that would prevent women or men from benefitting from the project?
- Are there specific constraints and/or opportunities for women and men from different social, ethnic, economic or age groups?
- Who will access and control the project resources and benefits at the community and household levels?
- Are there laws, policies, social norms, and processes related to the project or executing agency that may exacerbate gender inequalities?

2. Does the project have the potential to contribute towards gender equality?**3. Are there any potential adverse impacts and/or risks of gender-based exclusion? (see section V for more information on gender-based risks and safeguards)**

- Will the adverse impacts of the project, including resettlement, be different for women and men?
- Will the project limit women's economic or property rights?
- Will the project or project-related activities increase gender based violence, human trafficking, and/or infections of HIV and AIDS or other sexually transmitted diseases?

4. How will gender inequalities, relations, or norms, affect the achievement and sustainability of the project's results?**BOX 2: Gender Mainstreaming in Costa Rica Human Capital Project (CR-L1043) Example**

A project in Costa Rica that aims to build human capital in the science, technology and engineering (STEM) sectors identified a number of gender gaps. Women made up only 30% of employees in STEM sectors and the average scholarship amount for women was 30% lower than for men. To address these disparities, the project includes measures to ensure equal opportunities for scholarships to both men and women. The program promotes women's candidacies for scholarships through measures such as raising the age limit for female applicants and providing stipends for childcare along with the scholarships. Most importantly, the project includes gender-related results (with targets). Specific targets include: at least 35% of recipients of postgraduate scholarships will be women; 30% of entrepreneurs receiving capacity building will be women; and 33% of professionals receiving training and certification will be women.

BOX 3: Comprehensive Program for Security and Inclusion (AR-L1074) Example

The general objective of the program is to reduce levels of crime, violence, and insecurity in the province of Buenos Aires by improving the capacity of the province's Ministry of Security, strengthening community participation, and introducing prevention programs. Within this broader context, domestic and gender-based violence were identified as specific issues requiring attention. Component III provides \$3.5 million of the \$25 million loan towards preventing and addressing gender-based violence. The component funds the training of police officers, outreach campaigns, and equipment and infrastructure upgrades to the **Comisarias de la Mujer y la Familia**, in order to improve their capacity to respond to victims.

garding contracting, specifics on ensuring equal access to project benefits, details on the content of gender trainings, and methodologies for the inclusion of women in project decision-making.

4.7 Gender Mainstreaming activities and components can include but are by no means limited to a series of activities listed in Table 2. In order to be implemented, all gender components and activities need to be **assigned financial or human resources in order to be implemented**, which should be clearly reflected in the project budget.

4.8 **Developing Gender-Related Results:** Project teams should develop gender-related results (outputs, outcomes, or impacts) and define indicators to measure them. In order to develop these gender-related results, indicators usually require data to be sex-disaggregated. While sex disaggregation of indicators is important and mandated by the Gender Policy (see Section VI.B), a sex disaggregated indicator does not by itself measure changes towards gender equality or women's empowerment (see Table 3). In particular, indicator baselines and targets should specify separate results for men and women that capture progress in reducing gender inequalities.

TABLE 2: Examples of Proactive Gender Mainstreaming Activities in Design

Activity Category	Description	Examples from IDB Projects
Equal access to project benefits	Differences in men and women's use of time, societal and productive roles, cultural norms, and household and power structures are barriers to equal participation in project benefits that can be addressed by specific activities such as: developing policies that seek to address gendered biases in beneficiary selection criteria; promoting women's participation in project-related benefits and opportunities (including setting targets), especially in sectors where they have been traditionally excluded; enforcing equal pay; reward companies for hiring women/designing gender-sensitive policies; and ensuring that men and women are equally informed of project objectives and benefits.	<p>The Housing and Comprehensive Habitat Improvement Program (NI-L1053) in Nicaragua, which seeks to upgrade and provide new homes to low-income families, set a target to ensure that at least 50% of housing grants and property titles are given to female-headed households.</p> <p>Haiti's Productive Infrastructure Program (HA-L1076) encouraged women who owned informal food businesses to apply for food vendor stalls in the industrial park developed by the project. Additionally, the project employed a proactive strategy to promote women's employment: the construction company was offered a monetary incentive (an additional 1% of the total contract amount) to hire a minimum of 30% women.</p>
Inclusion of women in project decision-making	The goal of these activities is two-fold: 1) to promote women's agency and leadership throughout all projects; and 2) to ensure that women's differential needs are addressed throughout the project cycle.	The Rural Water and Sanitation Program (ES-L1046) in El Salvador has a 50% quota for the inclusion of women in water management boards which are tasked with the supervision and maintenance of program-financed systems.
Institutional strengthening activities	Usually project/executing agencies require capacity building activities on relevant gender issues for staff and/or resources for the hiring of gender specialists.	The Program to Modernize the Justice Administration System (PE-L1031) in Peru includes training of judges and legal professionals on gender and indigenous issues and improves the efficiency of the system in addressing critical legal concerns for women.
Training to change gender norms, cultural stereotypes and reduce violence against women	Activities include training within existing capacity building programs or stand-alone training to promote positive gender outcomes (e.g. improving women's confidence and self-worth, improving knowledge of women's rights, engaging men to promote more gender equitable relationships)	The Social Safety Net Support Program (HO-L1071) in Honduras is developing health education trainings for female conditional cash transfer recipients and their partners which seek to change gender norms by promoting shared responsibilities in maternal and child health, child caring, and preventing intra family violence.

4.9 Gender-related results should follow a sound intervention logic (theory of change) that links inputs to activities, to outputs, to outcomes (and impact). The development objective is the direct impact or outcome that will occur as a result of the utilization of project products and/or services¹¹ (see Figure 2). Some projects may only be able to include gender-related output indicators (without corresponding gender-related outcomes), but this does not preclude these projects from contributing to broader project objectives or outcomes. For example, a rural water and sanitation program that seeks to contribute to sustainable water management in a country as the basis for sustainability may include an output indicator

with a target for the percentage of women to be included on water management boards. The logic of the project assumes that the participation of women in key decision-making bodies will improve the operational sustainability of the project because of women's central roles in the local management of water and as primary beneficiaries of such projects.

4.10 A solid gender-related results indicator has to be non-directional and specific, measurable, achievable, relevant, and time-bound (SMART). Table 3 above includes some examples of how to construct SMART gender-related results and indicators for IDB projects.

TABLE 3: Sex-Disaggregated vs. Results Contributing Towards Gender Equality

Expected Outcome	Outcome Indicator	Baseline	Target	Does it contribute to gender equality?
Increased share of engineers with advanced human capital	Percentage of engineers with masters degrees or doctorates out of all engineers devoted to R&D	25%	35%	No, it does not list separate results for women and men.
Increased share of female and male engineers with advanced human capital	Percentage of engineers with masters degrees or doctorates out of all engineers devoted to R&D	M: 20% F: 10%	M: 30% F: 15%	No, this is sex disaggregated, but does not close the gender gap. ⁹
Increased share of female and male engineers with advanced human capital while decreasing the gender gap among degree holders	Percentage of engineers with masters degrees or doctorates out of all engineers devoted to R&D	M: 20% F: 5%	M: 22% F: 10%	Yes, since the target seeks a reduction in the gender gap and lists results for men and women separately. ¹⁰
Increased participation of smallholders in sustainable agroforestry value chains	Number of smallholders participating in value chains	200	2000	No, it does not list separate results for women and men.
Increased participation of female & male smallholders in sustainable agroforestry value chains	Number of female and male smallholders participating in value chains	M: 150 F: 50	M: 1500 F: 500	No. The indicator is sex disaggregated, but does not close the gender gap.
Increased participation of female and male smallholders in sustainable agroforestry value chains while decreasing the gender gap in participation	Number of female and male smallholders participating in value chains	M: 150 F: 50	M: 300 F: 250	Yes, since the target seeks a reduction in the gender gap and lists results for men and women separately

M = male, F = female

9. Note that the gap is not reduced whether it is measured as a ratio or as an absolute number of percentage points.

10. In this case, the gap is reduced whether measured as a ratio or as an absolute number of percentage points (either measure would be an acceptable indicator.)

11. Quick Reference on Designing Results Matrices. IDB. Strategic Planning Division 2010.

FIGURE 2: Gender in the Results Chain¹²

4.11 Gender Mainstreaming Capacity: During the design phase, project teams need to assess the capacity of the executing agency to implement gender activities and components. In particular, teams should analyze whether the executing agency has: 1) institutional mandates and mechanisms to promote gender equality in the provision of their services within the wider framework of a national gender equality strategy; 2) gender experts/units or experience implementing gender-sensitive projects or studies; 3) sex-disaggregated data and gender indicators in its monitoring systems, necessary for measuring differentiated results for women and men.

4.12 Equal participation of women and men in project decision making and consultations: Women and men directly or indirectly affected by the project should be involved in project consultations, as well as in the design and implementation of the monitoring and evaluation activities. Additionally, the M&E plan can include sex-disaggregated process and project management indicators to measure women's participation in project decision making and consultations (e.g., number and percent of men and women consulted during project consultations, number and percent of men and women in project management/decision making positions).

Following the Policy

"In its public consultation processes, the Bank will seek the equitable participation of women and men, as well as the participation of civil society organizations.

In project-related consultations, the Bank will seek the inclusion of the women and men affected in a gender-sensitive and socio-culturally appropriate manner."

Art. 4.16

12. The assumption behind the results chain is that there was a gender gap that disfavors women graduates in STEM fields so that targeted scholarships for women in STEM fields would redress the gap.

TABLE 4: Summary Checklist - Is Gender Mainstreamed In Project Design?

	Y	N
Diagnostic: Gender Analysis		
1. Does the project present opportunities to improve gender equality?		
· Have gender gaps or barriers for women and men's participation/access to benefits been identified as part of the gender analysis?		
2. Have gender-based risks been identified (in terms of sex, ethnic origin, age, education and income levels, sexual orientation, etc.) as part of the gender analysis, social impact assessment, or the safeguard screening?		
Gender Components and Activities		
3. Have activities or components been designed to promote gender equality and/or mitigate gender-based risks?		
· Does the project include measures to ensure that men and women have equal access to project benefits?		
· Does the project envision measures for the equal participation of men and women in decision making throughout the project cycle?		
· Are there provisions in the plan of acquisitions and/or operations manual to promote gender equality in economic opportunities (employment, SMEs service provision, etc.), through the contracting/acquisitions process?		
· Have any measures to prevent, mitigate or compensate for gender-based risks been included in the project?		
4. If gender components and activities have been included, do they have assigned resources listed in the project budget?		
Gender Mainstreaming Capacity		
5. Will the executing agency have the capacity to implement gender components and activities?		
· Does the executing agency itself have a gender equality policy or is it explicitly assigned a role in a national gender equality policy?		
· Have activities (such as the hiring of gender specialists) been envisioned to ensure the project and executing agency has the capacity to mainstream gender issues?		
· Does the project include capacity building components for executing agency staff or project beneficiaries on relevant gender equality issues?		
· Do the relevant monitoring systems disaggregate data by sex?		
Gender-Related Results		
6. Does the project include gender-related results in the results matrix?		
· If indicator captures data for project beneficiaries, have disaggregated baselines and targets been established for women versus men's benefits and/or participation?		
Consultations		
7. Have women and men been involved equally in project consultations?		

Following the Policy

Monitoring Indicator for the Gender Policy

- Number and % of financial operations that include gender-related results in their results matrix.
- Number and % of technical cooperation and grants that include gender-related results (directly or mainstreamed) in their results matrix¹³

B. Integrating Gender into Execution and Supervision of Operations

4.13 Ensuring gender-related results included in the Progress Monitoring Report (PMR/PSR) are reported on periodically: The gender-related results included in the design phase should be monitored during the execution phase of the project cycle; this will allow the Bank and executing agencies to track progress towards achieving gender-related results. In the past, there have been discrepancies between the inclusion of gender-related results in the results matrices of IDB projects and the actual results reported in project PMR/PSRs.

4.14 Beyond following up on gender-related results, project supervision provides an opportunity for project teams to note good practices, barriers to the implementation of gender-sensitive components/actions, and identify unintended positive or negative effects. Project teams can apply a gender perspective to the periodic review of monitoring data and supervision of project activities. Sex-disaggregated data for project outputs and activities can easily show staff if beneficiaries are actually accessing project benefits in the intended way. For example, if only women are attending a family planning seminar then the results sought by the project will be harder to achieve, since men's participation is also essential.

TABLE 5: Summary Checklist- Is Gender Mainstreamed In Project Execution And Supervision?

	Y	N
1. Are gender activities and components progressing as planned?		
• Have institutional strengthening activities, like the hiring of gender consultants, progressed as planned?		
2. If there are gender-related results in the results matrix, are they being reported on in the PMR/PSR?		
3. Are project indicators showing any problems?		
• For those who are reached by the programs, is the effect on key outcomes different for women and men (if so, why?)		
• Are women and men accessing project benefits equally?		
• Are there any unintended adverse impacts based on gender, not already identified in the safeguards screening process?		
• Are women and men being equally included in communications and consultations with project stakeholders and beneficiaries?		
4. If mitigation measures for gender-based risks in the Environmental and Social Management Report (ESMR) were included, are they being implemented?		

13. The IDB nomenclature for technical cooperation grants has evolved since the approval of the Gender Policy so that technical cooperation grants are now split in three categories: Operational Support, Client Support, or Research and Dissemination.

Following the Policy

Monitoring Indicator for the Gender Policy

- Project completion reports (or expanded performance monitoring report) for financial operations that invest directly in gender equality that report satisfactory results for actions to foster gender equality
- Project completion reports for operations that include specific gender related results in their results matrix that report satisfactory results for actions to foster gender equality (number and percentage, by sector)

C. Integrating Gender into Project Closing and Evaluation

4.15 During the closing and evaluation of a project staff need to analyze whether gender-related results were achieved and if there were any unintended effects on gender equality. Through the Project Completion Report (PCR) process project teams have an opportunity to perform a gender analysis of different aspects of the project. There are four areas of the PCR—effectiveness, sustainability, safeguards, and findings/recommendations—where gender themes are potentially relevant¹⁴.

4.16 **Effectiveness:** This section of the PCR allows teams to review and report on progress on gender-related results (outputs, outcomes and impacts), since it evaluates the extent to which the project achieved or is expected to achieve its stated objectives.

- i. **Unanticipated outcomes:** This section of the PCR is a good place to include any effects on gender equality even if gender-related results were not explicitly included in project design. In particular, project teams should examine how the project has changed the situation of women and men (for better or worse). For example, during the closing of the first phase of **NI-L1053: Housing and Comprehensive Habitat Improvement Program**, the project team found that women-headed households had less than equal access to housing and land titles. Hence, in the second phase of the project, the team designed specific mechanisms to: 1) ensure that at least 50% of housing grants and accompanying property titles are given to female-headed households; and 2) guarantee the partici-

pation of women in decision-making and project monitoring. Analyses like these can only be developed if sex disaggregated-data is available (see Section VI.B for more on the importance of sex-disaggregated data).

- ii. **Project Implementation and Processes:** A gender analysis can be included in the review of project processes (how outcomes and outputs were delivered) even when gender was not included in other parts of the project cycle. In particular, the report should note if the project processes (whether implemented by the Bank or by an executing agency) affected gender equality, discrimination (e.g., did job postings encourage both men and women to apply to positions regardless of sector?), women's empowerment (e.g., were there specific efforts to ensure that women were part of project decision-making?), and equal participation and inclusion (e.g., were both women or women's organizations and women's ministries/secretariats consulted throughout the project cycle?).

4.17 **Risk for Sustainability:** Project teams should indicate if the counterpart institutions have allocated monetary resources to these components and have the institutional capacity to continue carrying out gender activities or components after the completion of the project.

4.18 **Environmental and Social Safeguards:** Project teams should note whether the gender safeguards mitigation measures were implemented and whether they were adequate. In addition, negative gender-based impacts which were not identified in the design phase should be noted, along with any measures that were taken to redress them in execution.

14. Note that this section outlines recommendations for the sovereign guarantee PCR but not the non-sovereign guarantee XPSR.

TABLE 6: Summary Checklist- Is Gender Mainstreamed In Project Closing and Evaluation¹⁵?

	Y	N
1. If gender related-results were included in the project, to what extent have these objectives been met?		
2. Have there been any unexpected or unintentional gendered effects of the project/policy? Did the project or policy change the situation of women compared to men? If so, for better or worse?		
3. Does the project evaluation analyze results for women and men?		

4.19 Findings and recommendations: Recommendations stemming from the implementation of gender activities/components are important to further understand which types of interventions are the most effective—and can provide inputs for future operations.

4.20 Integrating gender into process and impact evaluations: Evaluations should seek to include evaluators with gender expertise as part of the evaluation team and also ensure equal participation of men and women stakeholders in providing inputs to evaluations. Impact evaluations are needed to document the effects and impact that result from gender components and mainstreaming. The outcome and impact indicators in Annex 2 provide a non-exclusive menu of options for project teams trying to measure gender outcomes in their projects.

4.21 Even if gender equality was not a specific objective of the project, an evaluation—especially when an experimental methodology is used—provides a unique opportunity to learn about a project’s differential impacts on women and men. This can be extremely useful when a replication or second phase of the project is considered. The additional costs of measuring differential impacts can be relatively low, but should be incorporated into the design of the evaluation from the start.

15. Please see Annex 7 for a compiled list of the key questions for gender analysis and project cycle checklists.

V. APPLICATION OF GENDER SAFEGUARDS

Monitoring Indicator for the Gender Policy

- Number and percentage of loan operations that identify potential adverse gender impacts and include prevention or mitigation measures

Following the Policy

“The Bank will assess operations’ potential adverse impacts on gender equality beginning in the initial stage of preparation. If impacts of this nature are identified, the Bank will incorporate a gender analysis into its social impact and risk assessments. Where the analysis so indicates, the Bank will include measures in a timely manner to prevent or mitigate these impacts in the risk management plans and will monitor those measures.”

Art. 4.19

5.1 Identifying gender-based risks: As mentioned in the previous section, project teams need to identify the potential for gender-based risks and adverse impacts throughout the project cycle (particularly in the design stage). The Gender Policy identifies three key areas for potential gender risks and safeguards:

- Economic opportunities**--introducing unequal requirements for access to project-derived economic opportunities and benefits, including paid work, training, credit, or business opportunities. This includes introducing unpaid work unevenly, and introducing requirements that restrict the participation of women or men in project activities and benefits based on pregnancy, maternity/paternity leave, or marital status.
- Property rights**--Disregarding the right of women to inherit and own land, homes, and other assets or natural resources.
- Increasing the risk of **gender-based violence**, including sexual exploitation, human trafficking, or sexually transmitted diseases, including HIV/AIDS.

5.2 When potential adverse impacts based on gender have been identified, project teams should ensure the Environmental and Social Impact Assessment (ESIA) analysis addresses the potential negative impacts; this can be done by including expertise on gender analysis as one of the mandatory qualifications for the principal consultant, or by including a gender specialist as part of the analytical team.

5.3 Gender Safeguards Screening: All project profiles will undergo a Gender Policy filter report screening performed by Environment and Social Safeguards Unit (see Annex 4: Mr. Blue Gender Safeguards Filter Questions), which in the case of projects classified in the “A” or “B” safeguards category will most likely be an ESIA.

5.4 Mitigating and addressing gender-based risks: After identifying gender-based risks, the inclusion of mitigation measures for these risks should be included in the Environmental and Social Management Plan (ESMP) and Environmental and Social Management Reports for category “A” and “B” projects. Some examples of these measures are presented in Table 7.

TABLE 7: Examples of Mitigation Measures for Gender-based Risks

Activity Category	Mitigating Measures/Activities Description
Economic Rights	Ensuring equal participation in project-related economic opportunities through: policies promoting women's candidacies for positions; targets or quotas for women's participation in management/decision making bodies; gender-neutral candidate selection (e.g., blind resumes); equal pay for equal work policies; and maternity and paternity protection and leave.
Property Rights	Ensure all beneficiaries (and women in particular) have an official identity document so they can receive project benefits such as property titles or credit; ensuring all members with a legal claim to the property are represented in property titles.
Gender-based violence and STDs	Prevent the risk of gender-based violence or SRH risks by: (i) timely notification of communities of the risks associated with the construction of work camps nearby; and (ii) requiring an ethical code of conduct from companies and workers operating near communities.
	Provide or ensure provision of health and other services for the affected communities, and for violence victims and HIV patients, including legal and psychological services, as well as sexual and reproductive health services.
	Work with governments and NGOs to combat illegal activities such as human trafficking.
Communication of Women's Rights	Develop and implement capacity building programs and communication campaigns to inform and sensitize beneficiaries, local authorities and community leaders, government counterparts and project staff about women's rights, laws and policies that protect them, constraints they face, and project benefits to which they are entitled.

VI. MONITORING THE GENDER POLICY

Following the Policy

“The Bank will develop two types of indicators for monitoring the Policy: (i) indicators that measure the Bank’s effort to comply with the Policy; and (ii) indicators for measuring fulfillment of the targets in the action plan for each period; these will be set forth in the results framework of the action plans.”

Art. 6.1

A. Monitoring Gender-Related Results in Loans, Grants, and Country Strategies

6.1 The Gender Policy monitoring indicators are the most important source for measuring progress on gender equality at the IDB and focus on monitoring gender-related results in the results matrices of Bank country strategies, financial operations, and technical cooperation grants. Loan operations, grants, and country strategies that include at least one

gender-related result (at the output, outcome or impact level) in their results matrix will be counted as including gender-related results for the purposes of monitoring the Gender Policy indicators (see **Annex 5: Monitoring Indicators for the Gender Policy** for a full list). These indicators will be reported on periodically, as mandated by the Gender Policy, in: a report to the Board of Directors every three years; annually in the DEO; and in the quarterly and annual business reviews.

TABLE 8: Criteria for Gender-Related Results in Results Matrices of Projects

STEP 1: Is this indicator a Gender-Related Result?	YES	NO	Instructions
a Is it a gender-related outcome/impact? ¹⁶			If yes, this is a gender-related result. See Annex 3 for a list of outcome/impacts.
b OR, a gender-related output?			If yes, this is a gender-related result.
c OR, sex disaggregated indicator of project beneficiaries? ¹⁷			If yes, proceed to step 2.
STEP 2: Does the sex disaggregated indicator:	YES	NO	
a Have a disaggregated baseline and target?			If YES, proceed to b. If NO then indicator is only a sex-disaggregated result.
b Capture progress towards gender equality or women’s empowerment?			If YES, then this is a gender-related result; if NO then indicator is only a sex-disaggregated result.

16. See page paragraphs 2.3 and 2.4 for definitions of gender-related outcomes/impacts and outputs.

17. An example of a sex disaggregated indicator is: # of men and women farmers given access to improved agricultural services and investments

Following the Policy

“The Bank will require...disaggregation by sex of project beneficiaries, which will be required in those operations that record information on the beneficiary population. In addition, the Bank will require indicators that measure the Bank’s added contribution to regional objectives and its corporate effectiveness to be sex-disaggregated”

Art. 5.1

6.2 Table 8 outlines the criteria that the Bank will use to monitor the inclusion of gender-related results in results matrices of IDB projects. Both gender-related outcomes/impacts and gender-related outputs will count as gender-related results. This definition allows the Bank to monitor gender-related results in a wide range of sectors and allows for monitoring of gender-related outputs where gender-related outcomes cannot be measured or predicted. In particular, this definition recognizes that there are sectors where gender issues are less apparent or historically there is less experience with gender mainstreaming.

6.3 Monitoring the Quality of Gender Mainstreaming at the IDB: In order to measure the quality of gender mainstreaming in loan operations as part of the DEM review process, SPD will verify consistency between the diagnostic, the vertical logic, and the results matrix – including gender-related results – in projects where the diagnostic (POD and LP) identifies gender-related issues.

B. Sex-Disaggregated Indicators

6.4 The Gender Policy monitoring indicators also call for the Bank to measure “project monitoring reports that disaggregate project beneficiaries by sex”, which is an important mandate in addition to measuring gender-related results (see Box 4). In order to adequately implement the Gender Policy **all project indicators that list direct beneficiaries should be disaggregated by sex**. However, special emphasis should be placed on projects in areas where the Bank has committed to disaggregate its outputs by sex, race, and ethnicity as part of the IDB’s Ninth General Capital Increase (GCI-9).

BOX 4: The Importance of Sex-Disaggregated Data

Sex-disaggregated data can highlight important differences and inequalities between women and men. Sex-disaggregated data might reveal, for example, quantitative differences between women's and men's mortality rates; between girls' and boys' school attendance, retention and achievement; between women and men's access to and repayment of credit; or between women and men's voter registration, participation in elections and election to office (see 4.16 above). These data are a necessary input for a gender analysis in both PMR/PSRs and PCR/XPSRs.

C. Other Institutional Indicators for Measuring Gender Equality and Women's Empowerment in IDB Operations

6.5 Gender Additionality: The Sovereign Guarantee Development Effectiveness Matrix (DEM) incorporates a gender component in the Additionality section. Project teams should mark the project as offering gender additionality when the project, while not including gender-related results in its results matrix:

- i. has included concrete actions to promote gender equality and the needs of women and men in the design, implementation, monitoring or evaluation of the intervention.
- ii. has incorporated measures to prevent, avoid or mitigate any adverse gender impacts or risks of gender-based exclusion identified in the project risk analysis.¹⁸

6.6 Gender Equality field in OPUS: Project teams need to classify all IDB operations (including both loans and grants) with one of the following categories in the Gender Equality field under the "Classification" tab in OPUS:

- i. **Direct Investment in Gender Equality:** In order to qualify as a "direct investment in gender equality" operation, the project's main objective must be to promote gender equality or empower women (projects with gender components and activities will be classified as gender mainstreaming). They can make this contribution by ad-

ressing strategic gender objectives[1], generating new knowledge or building institutional capacity to enhance value added in this area.

- ii. **Gender-related results in results matrix:** In order for an operation to classify as "gender-related results in results matrix" it must include at least one gender-related result in the results matrix and not be considered a direct investment in gender equality.
- iii. **Gender Additionality (no gender results in results matrix):** The Sovereign Guarantee Development Effectiveness Matrix (DEM) incorporates a gender component in the Additionality section. Project teams should mark the project as offering gender additionality when the project, while not including gender-related results in its results matrix:
 - a. has included concrete actions to promote gender equality and the needs of women and men in the design, implementation, monitoring or evaluation of the intervention.
 - b. has incorporated measures to prevent, avoid or mitigate any adverse gender impacts or risks of gender-based exclusion identified in the project risk analysis.
- iv. **No gender focus:** No gender issues addressed.

18. The DEM Additionality section for gender is currently under review by SPD and GDI and, if necessary, will be updated to better measure progress towards implementing the IDB's Gender Policy.

VII. ANNEXES

Annex 1: Gender Mainstreaming and Direct Investment Resources

IDB project teams looking to integrate gender into their work, whether it be for gender mainstreaming purposes or for direct investment projects, can develop TCs and/or use a variety of resources under the framework of the IDB's GAP 2011-2013 (and subsequent action plans).

A. TECHNICAL COOPERATION GRANTS AND DONOR FUNDS

Project teams can apply to the GCM single window in order to develop projects corresponding to the three categories of TCs:

- Operational Support (OS) TCs to finance gender mainstreaming components of loan operations or design/support direct investment loans;
- Research and Dissemination (RD) TCs to finance studies or evaluations seeking to fill knowledge gaps (e.g. studies to understand what works to promote gender equality in fiscal management projects), and;
- Client Support (CS) TCs to build the institutional capacity of executing agencies to mainstream gender, implement direct investment loans, and/or pilot interventions with innovative solutions to gender equality issues.

The **Multi Donor Gender and Diversity Fund (MGD)** finance all of the above-mentioned activities since it seeks to contribute to the equitable and culturally appropriate development of IDB member countries by fostering gender equality, combating discrimination and supporting development with identity. The MGDs strategic priorities include:

- Knowledge creation and impact evaluations
- Pilot projects in high-priority new areas

- Operational inputs and project preparation for direct investment
- Mainstreaming support for Bank-wide operations

The MGD Fund, however, is not the only fund that can finance gender-related projects or activities. For instance the Korean and Japanese funds can finance projects seeking to redress gender issues linked to poverty reduction (e.g. projects seeking women's empowerment in indigenous communities) and the Citizen Security funds can finance projects linked to reducing VAW.

B. GDI AND ESG TECHNICAL ASSISTANCE

The Gender and Diversity Division (SCL/GDI): i) Ensures and supports the mainstreaming of gender and diversity issues in Bank operations, in both social and non-social sector projects; ii) Develops projects that support and open opportunities for indigenous people and afrodescendants; iv) Develops projects that promote gender equality and women's empowerment; iii) Analyzes, in coordination with the Environmental and Safeguards Unit (VPS/ESG), project risk levels in relation to social safeguard standards and works within the matrix to manage those risks appropriately; iv) Provides technical oversight to borrowers, executing agencies, Country Offices and other units of the Bank in matters related to projects in execution. Hence, SCL/GDI staff can support project teams by participating as team members in projects or by providing inputs for project design/execution, country sector notes and country strategies, and other relevant Bank initiatives. ESG staff and consultants can support project teams in the identification and mitigation of gender-based risks.

C. GAP RESOURCES¹⁹

Under the framework of the GAP 2011-2013 (and subsequent action plans) project teams can access the following

19. A majority of GAP resources are financed by administrative Corporate Input Products (CIP) funds which fluctuate yearly. However, IDB operational divisions have entered into cost-sharing arrangements for retainer consultants and some consultants are fully financed by division resources.

resources: i) direct technical assistance in the form of gender specialist consultants (also known as gender retainer consultants), ii) sector-specific technical notes/briefs providing guidance on how to integrate gender in a particular sector

(see table below); and iii) capacity building workshops or learning events for IDB staff and/or counterparts in member countries and IDB headquarters.

GCM FUNDS THAT CAN FINANCE GENDER-RELATED PROJECTS

Fund Name	Characteristics/ Restrictions
Institutional Capacity Strengthening Thematic Fund (ICS)	Technical support to institutional reform efforts in the public sector and which may involve NGOs or embrace PPPs. No limitations with respect to countries or project size. US\$10 million annual ceiling.
Japan Special Fund (JSF)	No loan-linked projects. All sectors eligible. Emphasis on: (a) Transportation and Logistics, (b) Disaster Prevention and Reconstruction, (c) Forest Conservation and Biological Diversity, (d) Social and Environmental sectors. Priority will be given to C and D countries. All sectors eligible. 30% limit per IDB member country. Prefers stand-alone projects. Projects size up to US\$1.5 million.
Japan Special Fund - Poverty Reduction Program (JPO)	No loan-linked projects. All sectors and countries eligible. Interest in community-based projects, community-driven development; must be executed by a NGO, civil society institution or local government; \$150k cap. Projects. Size up to US\$300,000. Projects targeting plural communities may be funded up to 1.5 million.
Korea Poverty Reduction Fund (KPR)	All sectors in which poverty reduction is main goal. Project size: Max. US\$1 million.
Citizen Security Fund (MCS and CSF)	Finances projects to improve national & regional capacity to: (i) generate, analyze, disseminate data to enable design, execution, & evaluation of citizen security policies based on information; (ii) strengthening capacity of State entities to manage & evaluate public policies on citizen security; (iii) promoting knowledge sharing & good practices through regional dialogue & bilateral cooperation between the countries.
Gender & Diversity Fund (GDF) and Multidonor Gender and Diversity Fund (MGD)	These funds seek to contribute to the equitable and culturally appropriate development of IDB member countries by fostering gender equality, combating discrimination and supporting development with identity. Strategic priorities include: Knowledge creation and impact evaluations; Pilot projects in high-priority new areas; Operational inputs and project preparation for direct investment; Mainstreaming support for Bank-wide operations. At least 20% must be allocated to each target group. No more than 15% of resource allocation per country.
Small & Vulnerable Countries (SVC)	Restricted to Bolivia, Honduras, Guatemala, Guyana, Nicaragua and Paraguay. No sector or amount restrictions beyond the \$1.66 Million annual allocation per country.
MIF Fund for Increasing Productivity and Promoting Inclusive Economic Growth (Productivity Fund)	The Productivity Fund would be used to further improvements in productivity in the LAC Region by providing resources to undertake project development, dissemination, research and development, and staff specialization in new areas. The Fund would be used, among other things, to (i) promote the scaling up of successful programs, (ii) identify and disseminate international best practices for inclusive private sector development, and (iii) structure innovative private sector development projects that increase productivity and reduce poverty. The productivity fund currently has 7 approvals in women's economic empowerment totaling approximately \$3.4 million.

SECTOR-SPECIFIC GENDER TECHNICAL NOTES AND GUIDES GAP 2011-2013²⁰

Technical Notes

Housing in Urban Settings: technical note for the Incorporation of a Gender Equality Perspective

Neighborhood upgrading: technical note for the incorporation of a Gender Equality Perspective

Citizen Security and Violence Against Women: Technical note for the incorporation of a Gender Equality Perspective

VAW and Justice Systems: Technical Notes

Guide for the inclusion of Gender in Bus Rapid Transit Systems

Technical Note Trade and Gender

Technical Note: Gender and Rural Water

Technical Brief: Gender and Climate Change Adaptation Note

Technical Brief: Gender and Climate investment funds note

Technical Brief: Gender and Rural Development

Thought piece: Gender and Financial regulation

Technical Brief: Gender and Financial Institutions

Technical Brief: Gender and Fiscal Management

Technical Note: Gender and SRH Projects

Gender Safeguards Note: Economic Rights

Gender Safeguards Note: Property Rights

Gender Safeguards Note: VAW, trafficking and HIV

20. A majority of the gender technical notes and guides will be finalized in 2013 and uploaded to the IDB's Gender webpage.

ANNEX 2: EXAMPLES OF STRATEGIC GENDER OBJECTIVES, OUTCOMES, AND INDICATORS

EMPOWER WOMEN ECONOMICALLY

Strategic Objective	Expected outcomes	Indicators ²¹
Increase women's access to quality jobs and economic opportunities	Increased women's participation in formal sector employment	# of formal sector male and female jobs added as a result of IDB projects in the country by sector
	Increased women's participation in high productivity sectors	# of male and female jobs added as a result of IDB projects in the country by sector
		Men and women benefited from programs to promote higher labor market productivity (training and intermediation programs)
		Share of women employed in the nonagricultural sector as a result of IDB projects in the country (% of total jobs created)
	Increased women's sector-specific skills	Women trained in high productivity sector (s) skills
		# of women trained in business/financial skills
		# of men and women public trade officials and private entrepreneurs trained in trade and investment
		Individuals (all, men, women, youth) benefited from programs to promote higher labor market productivity
To support the growth of women-owned businesses and female entrepreneurs	Increased number of women-owned businesses	% of tertiary level graduates in science and engineering who are women
		# of male and women-owned Micro/Small/Medium productive enterprises financed
		% of women owned businesses
	Increased financing for women farmers/agricultural enterprises	% of SMEs owned by women
		# of men and women farmers given access to improved agricultural services and investments
		# of women receiving loans from an IDB supported financial institution

21. These indicators are exemplary but not exhaustive. Some of the indicators on this list are sex-disaggregated indicators which require disaggregated base-lines and targets that capture progress towards gender equality in order to be considered gender-related results.

REDUCE VIOLENCE AGAINST WOMEN

Strategic Objective	Expected outcomes	Indicators
Prevent Violence Against Women	Increased gender-equitable attitudes	% of women whose husband or partner demonstrated specific control behaviors (i.e. jealousy if woman talks to other men, impedes contact with friends or family, woman accused of infidelity, not trusted with money)
	Increased men and women's knowledge of VAW-related rights, laws, and services	# and % of women who demonstrate knowledge of available VAW services, rights, or laws
		# of men and women (or families) who underwent gender equality trainings or programs
		# of men and women (or families) who underwent VAW/rights trainings
		# of public communication campaigns on VAW services, rights, or laws (local, regional, national)
To improve law enforcement's capacity to manage VAW cases	Increased number of law enforcement entities capable of managing VAW cases/complaints	# and % of law enforcement units trained in managing VAW complaints
		# and % of law enforcement professionals trained in managing VAW complaints
		# and % of judicial personnel trained in managing VAW complaints
		% of female police officers
	Increased number of VAW cases prosecuted by the law	# of women who reported physical and/or sexual violence to relevant authorities
		# of VAW cases that were prosecuted by law
To expand access to VAW support and services	Expanded coverage of programs providing VAW support	# of women calling local or nationally established VAW support hot-lines
		# of women and men benefitting from VAW support services
		# of women's centers providing VAW support/referral/care
		# of women's organizations involved in citizen security/domestic violence projects
	Improved capacity of health services to manage, identify, and refer VAW cases	# and % of health units (centers, hospitals, clinics) that have documented & adopted a protocol for the clinical management of VAW survivors
		# of health units trained to identify, refer, and care for VAW and/or intra family violence survivors
		# and % of health units with at least one service provider trained to care for and refer VAW survivors
	Improved capacity of government service personnel to identify and refer VAW cases (To increase the number of VAW-based convictions)	Proportion of nursing and medical schools that include VAW as part of their core curriculum
		Proportion of teachers and education professionals that have undergone VAW trainings

REDUCE MATERNAL MORTALITY AND ADOLESCENT PREGNANCY

Strategic Objective	Expected outcomes	Indicators
To increase accessibility of gender-sensitive sexual and reproductive health services	Increased accessibility of sexual and reproductive health services	# of maternal health clinics/centers built and equipped according to relevant standards
		% of health establishments with the capacity to provide emergency obstetric services
		# of births attended by skilled health staff/healthcare institutions
		% of women who had their last birth at a health institution
		# of pregnant women receiving at least (insert relevant #) prenatal/postnatal care services
		Unmet need for contraception (by age, education, income level)
		# and % of health units equipped with and providing modern contraceptive methods
		% and # of health units/youth centers providing support and modern contraceptive methods to youth
	Increased gender and cultural sensitivity of maternal health services	% of health personnel trained in intercultural and gender-sensitive sexual and reproductive health protocols
		% of women who received culturally appropriate reproductive health services (i.e. vertical birth, accompanying family members)
		% of health personnel trained in intercultural and gender-sensitive sexual and reproductive health protocols
To improve men and women's ability to make informed decisions about their sexual and reproductive health	Improved men and women's sexual and reproductive health knowledge	# of young men and women trained through information, education, or communication strategies in family planning and modern contraceptive methods
		# of young men and women trained through information, education, or communication strategies in life skills (self-esteem, confidence, etc)
		# and % of primary schools including sexual and reproductive health courses (including modern contraceptive methods)
		# and % of secondary schools including sexual and reproductive health courses (including modern contraceptive methods)
		# of men and women trained through information, education, or communication strategies in family planning and modern contraceptive methods (by age cohort)
		# of public information campaigns targeting youth or parents on sexual and reproductive health
		# of men and women with knowledge of woman's fertile period during ovulation cycle
		# and % of young men and women who have discussed family planning/contraceptive methods with their parents

REDUCE MATERNAL MORTALITY AND ADOLESCENT PREGNANCY

Strategic Objective	Expected outcomes	Indicators
To improve men and women's ability to make informed decisions about their sexual and reproductive health	Improved gender equitable attitudes	# of young men and women undergoing trainings/courses on gender equality and joint-decision making in intimate partner relationships
		# of parents undergoing trainings/courses/counseling on communicating about sexual and reproductive health with their children
		# of parents undergoing trainings/courses/counseling on communicating about sexual and reproductive health with their children
		# and % of young men and women with favorable attitudes towards a woman's right to refuse sexual relations

CLOSE GENDER INEQUALITIES IN EDUCATION

Promote gender equality through school curriculums	Increase gender-sensitivity in school curriculums and teaching strategies	Proportion of pedagogical context without gender stereotypes in school curricular and textbooks
		Proportion of pedagogical context in local languages
		% of schools integrating VAW/GBV prevention modules/courses in curriculum
	Increased capacity of teachers to implement gender-sensitive curriculums	# and % of teachers receiving training on gender-sensitive curriculums, VAW prevention and identification, and/or sexual and reproductive health courses
Increase gender equality in school attendance for boys and girls (particularly for indigenous girls and boys in Central America and the Caribbean)	Increased access to education for girls and boys	# of indigenous students benefited by education projects (girls, boys)
		# of students benefited by education projects (girls, boys)
		Ratio of female to male primary enrollment (%)
	Increase primary school attendance for indigenous girls	Primary completion rate for boys and girls (indigenous, non-indigenous)
	Reduce dropout rates for indigenous girls and boys	secondary completion rate for boys and girls (indigenous, non-indigenous)
		secondary completion rate for boys and girls (indigenous, non-indigenous)
		secondary completion rate for boys and girls (indigenous, non-indigenous)
	Reduce gender gap in tertiary education	Ratio of female to male tertiary enrollment (%)

INCREASE WOMEN'S PARTICIPATION IN DECISION-MAKING

Strategic Objective	Expected outcomes	Indicators
To improve women's empowerment in decision-making in the household	Improved women's decision-making power in their lives and households	# of women and men who have undergone in women's empowerment/gender equality trainings linked to IDB projects
		% of women who make their own decisions about four key decisions in the household, by age (their own healthcare, large household expenditures, daily expenditures, visiting friends and family)
		# of women undergoing political leadership trainings
To increase women's participation in public and private sector leadership	Increased women's participation as candidates for national parliament	% of senior positions in central/federal government filled by women
	Increased women's participation in public sector leadership	# of women undergoing leadership/empowerment trainings
	Increased women's participation in business leadership	% company board members who are women
		% of women in managerial positions (Women's share of managerial positions)

REDUCE THE BURDEN OF CARING ON WOMEN

To improve individual care systems for children and adults	Increased availability of child care	# of child care centers built
	Increased availability of elderly care	# of elderly care centers built
To support shared responsibilities for child care and household duties between men and women	Decreased in the ratio of hours women spend caring for children compared to men	# of hours men and women spend on child care
	Improved gender equitable attitudes between parents	# of parents undergoing trainings/courses on the equal distribution of child-care and household duties between men and women
		# of communication campaigns/spots promoting shared responsibilities for child care and household duties between men and women
		# of hours spent on unpaid domestic work by sex (average)

ANNEX 3: GENDER AT A GLANCE COUNTRY-LEVEL INDICATORS ON GENDER EQUALITY*

Women's Economic Opportunities	Male and female poverty rate (\$2.5 per day and/or % under national poverty line)*	WB: WDI
	Labor force participation rate, male and female (% of population ages 15-64)	WB: WDI
	Ratio of female to male youth unemployment rate (% ages 15-24)*	WB: WDI
	Male and female unemployment rate (% of female labor force, % of male labor force)	WB: WDI
	Employed population by (relevant) sector, male and female (% of population ages 15-64)	WB: WDI
	Ratio of female to male unemployment rate (% of female employment)	WB: WDI
	Self-employed, males (% of males employed) and self-employed females (% of females employed)	WB: WDI
	% of men and women with an account at a formal financial institution*	IMF
	% of men and women with a loan from a formal financial institution*	IMF
Violence Against Women	% of Women aged 15 to 49 who have experienced some form of sexual violence (by age)	PAHO
	% of Women and men aged 15 to 49 who have experienced some form of violence (by age)	PAHO
	% of women aged 15-49 who ever experienced physical violence from an intimate partner*	PAHO
	% of women aged 15-49 who ever experienced sexual violence from an intimate partner	PAHO
	# of women's deaths at the hands of their intimate partner or former partner per 100,000 inhabitants*	UNODC
	Female and male homicide rates/ % increase in female and male homicide rates	UNODC/WHO
	% of women who report being afraid of being victimized/suffer a crime in public spaces in last 12 months*	PAHO
	Number of VAW complaints reported to the police or relevant authorities*	PAHO
Sexual and Reproductive Health	Maternal mortality ratio (per 100,000 live births, by age, urban/rural, indigenous or afro areas)	WB: WDI
	Births attended by skilled health staff/healthcare institutions (% of total)*	PAHO/WB
	Pregnant women receiving prenatal care (% , by age)*	PAHO/WB
	Contraceptive prevalence (% of women ages 15-49, % of sexually active women ages 15-19)	WB: WDI
	Adolescent fertility rate (births per 1,000 women ages 15-19)	WB: WDI
	% of women with knowledge of modern contraceptive methods (by age)	UNFPA
Education	Ratio of female to male primary school enrollment (% net)	WB: WDI
	Ratio of female to male secondary school enrollment (%net)	WB: WDI
	Ratio of female to male tertiary school enrollment (%net)	WB: WDI
	Primary completion rate, female, male (% of relevant age group)	WB: WDI
	Secondary completion rate, female, male (% of relevant age group)	WB: Education Statistics
	Boys and girls out of school, primary, male	WB: WDI
Participation of women in decision-making	Female legislators, senior officials and managers (% of total)	http://www.ipu.org
	Female professional and technical workers (% of total)*	ILO
	% of SMEs owned by women (%)*	GPFI
	Women's share of government ministerial positions	http://www.ipu.org

*Not for every country.

ANNEX 4: MR. BLUE GENDER SAFEGUARDS FILTER QUESTIONS

	Y	N
1. Potential to negatively affect women or gender equality		
2. Is this project specifically designed to address gender equality or women's empowerment issues?		
3. Does this project offer opportunities to promote gender equality or women's empowerment through its project components?		
4. The operation is in compliance with environmental, specific women's rights, gender, and indigenous laws and regulations of the country where the operation is being implemented (including national obligations established under ratified Multilateral Environmental Agreements).		

ANNEX 5: MONITORING INDICATORS FOR THE GENDER POLICY

1. Indicators of proactive action for gender equality:
A. Country strategies that include gender-related results in their results matrix (number and percentage).
B. Financial operations that invest directly in gender equality and the empowerment of women (number, percentage, and amount)
C. Financial operations that include gender-related results in their results matrix (number, percentage, and amount, by sector)
D. Operational inputs that include gender-related results (directly or mainstreamed) in their results matrix (number, percentage, and amount, by sector)
E. Knowledge and capacity-building products that include gender-related results (directly or mainstreamed) in their results matrix (number, percentage, and amount, by sector)
2. Indicators of preventive action for gender equality:
A. Loan operations that identify potential adverse gender impacts and include prevention or mitigation measures (number and percentage)
3. Indicators for monitoring project results:
A. Project monitoring reports and loan results reports for lending operations that include specific gender-related results in their results matrix (number and percentage)
B. Project monitoring reports that disaggregate project beneficiaries by sex (number and percentage)
C. Project completion reports (or expanded performance monitoring report) for financial operations that invest directly in gender equality that report satisfactory results for actions to foster gender equality in operations that invest directly in gender equality (number and percentage, by sector)
D. Project completion reports for operations that include specific gender related results in their results matrix that report satisfactory results for actions to foster gender equality (number and percentage, by sector).

ANNEX 6: KEY DEFINITIONS

TERM	DEFINITION
Gender	The term gender refers to the behavioral characteristics and roles that are socially attributed to women and men in a given historical, cultural, and socioeconomic context, beyond their biological differences, and that help shape the responsibilities, opportunities, and barriers encountered by women and men.
Gender Equality	Gender Equality means that women and men enjoy the same conditions and opportunities to exercise their rights and reach their social, economic, political, and cultural potential.
Gender Equity	Gender Equity is the process of being fair to men and women which implies providing and distributing benefits and/or resources in a way that narrows the existing gaps, while recognizing that these gaps can harm both women and men.
Gender Mainstreaming	Gender mainstreaming is the process that seeks to have gender equality and the needs of women and men be identified, heard, and addressed in the design, implementation, monitoring, and evaluation of the Bank's interventions.
Gender Analysis	Gender analysis identifies the gender dimensions of any given issue or intervention to mainstream gender by assessing the differences in gender roles, activities, needs, and available opportunities of men and women.
Gender Related-Results	A gender-related result is defined as an output, outcome, or impact that contributes towards gender equality or women's empowerment.
Gender-Related Outcome/ Impact	A gender-related impact/outcome lists separate long term (impact) or short term (outcome) changes for women and men beneficiaries or effects that capture improvements in gender equality, reduce women or men's barriers to access project benefits, and/or promote equitable gender norms and behaviors (e.g. decrease in the rate of intimate partner violence, increases in the revenues of women-owned businesses, increases in proportion of women holding land titles, and decreases in the adolescent pregnancy and maternal mortality rates).
Gender-Related Output	Gender-related outputs list separate inputs, activities and immediate results of project activities that seek to promote gender equality or redress gender inequalities by targeting women beneficiaries, women-owned businesses or women-headed households. Women-focused services or men-focused services linked to strategic gender objectives and policies/curricula /manuals/campaigns incorporating a gender perspective are considered gender-related outputs, as well as the results of these activities.
Gender Safeguards	This is the process through which the Bank identifies and addresses potential adverse impacts for women and men and risks of exclusion based on gender.
Gender Indicator	Gender indicators are quantitative or qualitative factors or variables that reflect changes in gender-related results.
Sex-Disaggregated Data	This refers to data (statistics, interview results, and other basic information) that clearly distinguishes between data applicable to women and data applicable to men.
Women's Empowerment	Understood to mean expanding the rights, resources, and capacity of women to make decisions and act independently in social, economic, and political spheres.

ANNEX 7: GENDER ANALYSIS AND GENDER MAINSTREAMING IN PROJECT CYCLE CHECKLIST

KEY QUESTIONS FOR A GENDER ANALYSIS

1. Does the problem/issue under analysis affect women and men differently? If so, how and why?

a. What are the context-specific differences in gender roles, responsibilities, needs, and available opportunities of men and women regarding the issues addressed by the project?

b. Will women and men benefit equally from the results of the intervention?

i. Are there any gender-specific barriers that would prevent women or men from benefitting from the project?

ii. Are there specific constraints and/or opportunities for women and men from different social, ethnic, economic or age groups?

c. Who will access and control the project resources and benefits at the community and household levels?

d. Are there laws, policies, social norms, and processes related to the project or executing agency that may exacerbate gender inequalities?

2. Does the project have the potential to contribute towards gender equality?

3. Are there any potential adverse impacts and/or risks of gender-based exclusion? (see section V for more information on gender-based risks and safeguards)

a. Will the adverse impacts of the project, including resettlement, be different for women and men?

b. Will the project limit women's economic or property rights?

c. Will the project or project-related activities increase gender based violence, human trafficking, and/or infections of HIV and AIDS or other sexually transmitted diseases?

4. How will gender inequalities, relations, or norms, affect the achievement and sustainability of the project's results?

SUMMARY CHECKLIST - IS GENDER MAINSTREAMED IN THE PROJECT CYCLE?

PROJECT DESIGN

Y

N

Diagnostic: Gender Analysis

1. Does the project present opportunities to improve gender equality?

Have gender gaps or barriers for women and men's participation/access to benefits been identified as part of the gender analysis?

2. Have gender-based risks been identified (in terms of sex, ethnic origin, age, education and income levels, sexual orientation, etc.) as part of the gender analysis, social impact assessment, or the safeguard screening?

SUMMARY CHECKLIST - IS GENDER MAINSTREAMED IN THE PROJECT CYCLE?

PROJECT DESIGN	Y	N
Gender Components and Activities		
3. Have activities or components been designed to promote gender equality and/or mitigate gender-based risks?		
· Does the project include measures to ensure that men and women have equal access to project benefits?		
· Does the project envision measures for the equal participation of men and women in decision making throughout the project cycle?		
· Are there provisions in the plan of acquisitions and/or operations manual to promote gender equality in economic opportunities (employment, SMEs service provision, etc.), through the contracting/acquisitions process?		
· Have any measures to prevent, mitigate or compensate for gender-based risks been included in the project?		
4. If gender components and activities have been included, do they have assigned resources listed in the project budget?		
Gender Mainstreaming Capacity		
5. Will the executing agency have the capacity to implement gender components and activities?		
· Does the executing agency itself have a gender equality policy or is it explicitly assigned a role in a national gender equality policy?		
· Have activities (such as the hiring of gender specialists) been envisioned to ensure the project and executing agency has the capacity to mainstream gender issues?		
· Does the project include capacity building components for executing agency staff or project beneficiaries on relevant gender equality issues?		
· Do the relevant monitoring systems disaggregate data by sex?		
Gender-Related Results		
6. Does the project include gender-related results in the results matrix?		
· If indicator captures data for project beneficiaries, have disaggregated baselines and targets been established for women versus men's benefits and/or participation?		
Consultations		
7. Have women and men been involved equally in project consultations?		
PROJECT EXECUTION AND SUPERVISION		
1. Are gender activities and components progressing as planned?		
· Have institutional strengthening activities, like the hiring of gender consultants, progressed as planned?		
2. If there are gender-related results in the results matrix, are they being reported on in the PMR/PSR?		
3. Are project indicators showing any problems?		
· For those who are reached by the programs, is the effect on key outcomes different for women and men (if so, why?)		
· Are women and men accessing project benefits equally?		
· Are there any unintended adverse impacts based on gender, not already identified in the safeguards screening process?		
· Are women and men being equally included in communications and consultations with project stakeholders and beneficiaries?		
4. If mitigation measures for gender-based risks in the Environmental and Social Management Report (ESMR) were included, are they being implemented?		
PROJECT CLOSING AND EVALUATION		
1. If gender related-results were included in the project, to what extent have these objectives been met?		
2. Have there been any unexpected or unintentional gendered effects of the project/policy? Did the project or policy change the situation of women compared to men? If so, for better or worse?		
3. Does the project evaluation analyse results for women and men?		



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