

TOPIC: The IFIs – The Gender Policies of the World Bank Group and the IMF

Conceptual rating: [BASIC to INTERMEDIATE level](#)

Suggested module objectives:

- 1) Learn about the WB and IMF's approach to gender in terms of operational policies and strategic action plans
- 2) Learn about the rudiments of how responsibility for advancing gender concerns is structured within these organizations
- 3) Provide an opportunity to evaluate the ability of the IMF and WB to advance gender equality given these policies and plans, and structural arrangements.

Notes to facilitator: These objectives assume that the audience will be familiar with the basic structure and operations of the World Bank Group and IMF, and have at least a rudimentary knowledge of a gendered critique of their policy conditionality. Given the lack of an explicit gender policy at the IMF, the focus will be on the World Bank. Module 13 will cover accountability mechanisms and the extent to which they may be effective tools for advancing gendered concerns.

Key concepts:

- 1) There is a lack of any explicit, enforceable gender policy at the IMF.
- 2) The World Bank has the most comprehensive gender policy statement of any of the IFIs. Only four of the IFIs have any kind of gender policy.
- 3) The difference between a gender policy that affects procedures, and a gender policy that affects the content of what is done.
- 4) How locating gender expertise and responsibility within a structure of an organization can make all the difference in how effective people are, how seriously a gender perspective is taken and integrated into the work.
- 5) Major gaps between World Bank rhetoric and actual practice with respect to gender.

Cross references:

- **Link with Module 12** – IFI mission and structure
- **Link with Module 13** – The IFIs: Their rationale for and consequences for not using feminist gendered macroeconomic policies

- ***Link with Module 15*** – The Gender Policies of the Regional Development Banks
- ***Link with Module 16*** – Accountability Mechanisms at the WB and IMF
- ***Link with Module 17*** – Accountability Mechanisms at the Regional Development Banks

Time required: 90-120 minutes

Suggested methodology: Large and small group DISCUSSION. Mini LECTURE. CASE STUDY.

Relevant readings:

- AWID, “The World Bank and Women’s Rights in Development”, No. 5, October 2002.
- Chamberlain, Christopher, “A Citizen’s Guide to Gender and the World Bank”, Bank Information Center, September 1996.
- Dennis, Suzanna and Zuckerman, Elaine, “Gender Guide to World Bank and IMF Policy-Based Lending”, Gender Action, December 2006.
- Heinrich Böll Foundation, Gender Action, CIEL, “Gender Justice: A Citizen’s Guide to Gender Accountability at International Financial Institutions” 2007.
- Khundker, Nasreen, “A Gentle Touch? Gender and the World Bank: A Critical Assessment”, paper for Heinrich Böll Foundation event on the WB gender mainstreaming seminar, Jan 13, 2004.
- Long, Carolyn, “The Advocate’s Guide to Promoting Gender Equality at the World Bank”, Women’s Edge, April 2003.
- Wichterich, Christa, “The New ‘Smarties’ of the World Bank: Competitive Women”, Women In Development Europe, December 2006.
- Women’s Eyes on the Bank Campaign website.
- Zuckerman, Elaine, “Huge Gaps in the World Bank’s Gender Action Plan”, Bretton Woods Project, Update 54, January, 2007.
- Zuckerman, Elaine, et. al., “The Gender Dimensions of Post-Conflict Reconstruction: The World Bank Track Record”, Gender Action, June 2007.
- Zuckerman, Elaine et. al, “Reforming the World Bank: Will the Gender Strategy Make a Difference? A Study with China Case Examples”, Heinrich Böll Foundation, updated version 2005.

Specific relevant readings from the World Bank:

- World Bank, Operational Policy 4.20, “Gender and Development”, March 2003.

- World Bank, “Gender Equality as Smart Economics: A World Bank Group Action Plan (FY07-10) abstract and complete versions available.
- World Bank, “Integrating Gender into the World Bank’s Work: A Strategy for Action”, January 2002.
- “Evaluating a Decade of World Bank Gender Policy, 1990-1999”, 2005.
- “Engendering Development through Gender Equality in Rights, Resources and Voice,” 2001. (Available in multiple languages)
- “Mainstreaming Gender and Development in the World Bank: Progress and Recommendations”, 1999.
- “Mainstreaming Gender in World Bank Lending: An Update”, 1997. Also recommend looking at the original 1994 study – for which this is an update.
- “Gender and Macroeconomic Policy”, 2008.

Preparation and supplies needed:

- Newsprint pad/flip chart paper and markers to record certain parts of the discussion
- Review suggested reading material.
- Review IMF, World Bank, and Gender Action websites to determine whether there are any new developments at these IFIs with respect to the development and implementation of their gender policies and strategies that should be incorporated into this module.
- Decide the focus of the case study – whether to pull material from Zuckerman related to China or a country that was in the midst of post-conflict reconstruction OR whether to use WB documents related to your own country. If you are doing your own country, you may want to also duplicate or adapt material from the BIC guide outlining the loan cycle and appropriate questions to ask at each stage. Prepare and duplicate reading materials for all participants.
- Decide whether to duplicate copies of the comparative gender policy charts in the Appendices of “Gender Justice” for participants.
- Gather some statistics about the relative amounts of money lent to your country by the IMF, WB, and appropriate regional development bank.
- Draw a simple schematic showing the key steps in the IMF’s and WB’s relationship with your country (PRSPs, PRGFs, CAS, LOI, loan cycle tranches, etc.) on newsprint/flipchart paper and prepare to put this on the wall for all to see at the appropriate time.
- On flipchart/newsprint paper, write out the questions you want the small groups to consider when doing the case study. If the groups will be in different rooms, make enough copies of the questions for each group to have one.

Suggested content to be covered:

- Briefly review the functions of each of the 5 parts of the World Bank Group; the difference between project and policy-based loans; the steps by which a project loan gets developed; the steps by which a policy-based loan is developed.
- Talk about the lack of an explicit, enforceable gender policy at the IMF. See “Gender Justice” for more details.
- Put the WB in context, contrasting with other IFIs. Only half of 8 IFIs have any kind of gender policy, and the WB is the most comprehensive in terms of gender policy statements, environmental impact assessments (which include a social component) and information disclosure. Offer a statistic which illustrates the relative size of WB, IMF and appropriate development bank lending in your country.
- Review the “Integrating Gender into the World Bank’s Work: A Strategy for Action” (Bank’s internal gender mainstreaming policy), its Operational Policy 4.2 on Gender and Development which relates to the Country Gender Assessments (CGAs), and the Bank’s Gender Action Plan for FY2007-2010. Note that while the CGA is mandatory, no gender actions are required and there are no rights-based targets. The Bank has no enforceable policies or procedures on gender equality or women’s rights, and what they do have does not apply to policy-based loans.
- If desired, distribute a copy of the comparative policy charts from “Gender Justice” (or a copy of the entire manual). Look at the different components of the WB group and which policies affect them.
- Assess the meaning and impact of the policies and strategies by engaging in a case study. (See preparation section for more details).
- Evaluate recommendations for change based on the conclusions of the case study, and observations from AWID, Zuckerman et. al., Long, Khundker. How much will internal policies do to advance gender equity while neo-liberal macroeconomic policies and theory informs the IFIs’ approach?
- Evaluate where the WB has located responsibility for gender work within its organization and what this means for effectiveness. Pair this with an evaluation of the External Gender Advisory Group’s functioning.

Description of how to conduct the session:

1. Welcome by host group(s) and introduction of facilitator(s); provide any needed logistical information; outline goals for session.
2. Depending on size of group, invite participants to introduce themselves, share an expectation or question they bring. (Record expectations or questions on newsprint, if you are doing this step, and refer to them throughout the session.) If this is part of a larger economic literacy effort and the group has already met, this step may be shortened or eliminated.

3. **Large group DISCUSSION.** Warm up the group by asking them a series of questions related to the relative scale of lending by the IMF, WB, and regional development bank in your country over the past 5-10 years. How much money was involved? Which sectors? What has been the most important impact – for males? For females? Which part of the WB has been active in your country (IDA, IBRD, MIGA, IFC)?
4. **Mini LECTURE.** Move into a **quick** review/refreshers (as needed) about the structure of the World Bank Group, the difference between project and policy-based loans, the steps by which loans get approved (focus on the World Bank). Talk from the newsprint diagram/schema you developed in advance.
5. Set the context for the case study work by talking about gender policy at the IFIs – comparing them. Explain why you will focus on the World Bank. Distribute copies, if desired, of key gender documents, including the comparative IFI gender policy charts. Review the highlights with the group.
6. **Small group DISCUSSION. CASE STUDY.** Break into smaller working groups of about 5-7 people. Give everyone background materials for the case studies and go over the questions you want the small groups to discuss. Give the groups about 30 minutes to work, depending on how much reading time is required for the background materials.
7. **Large group DISCUSSION.** De-brief the case study, working through each question and asking for comments from the audience. One way to ensure more equal participation is to invite a different group each time to begin talking about their answer to a particular question. Track the salient points re: strengths and weaknesses of the policy and strategy on newsprint.
8. Help the group synthesize what they learned by first asking them what ideas they have to improve the Bank's effectiveness in promoting gender equality. Then, add some other recommendations from the readings, as time permits. Close with a discussion of the question about how effective the Bank can be as long as it advances neo-liberal economic policies. What does it mean to solicit women's participation and voice in various WB processes in this larger context? What is an appropriate response on the part of NGOs?
9. If this is part of a larger economic literacy effort, link this session to the next one. Provide logistical details related to the next session, as appropriate. Thank the audience for their participation.

Ideas for alternative methodologies/modification of the level of discussion:

- **For an intermediate to advanced group or a more activist group:** One option would be to focus a discussion around the World Bank's periodic internal evaluations of its work on gender and contrast this with NGO critiques. Arrange for the group to meet with a World Bank representative in your country to discuss these issues. This could be a Part 2 to this module, after the group has a chance to review current policies and procedures and

study the WB's involvement in your country. Much more time could be spent in discussion of point 8 above with an advocacy or activist-inclined group.

Some useful organizations or websites related to this topic:

- www.awid.org
- www.bicusa.org
- www.ciel.org
- www.dawnnet.org
- www.genderaction.org
- www.jubileesouth.org
- www.imf.org
- www.socialwatch.org
- www.wide-network.org
- www.worldbank.org/gender