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## Evaluation Under Occupation: The Role of Evaluators in Protecting and Promoting Social Justice and Equality in Conflict-Affected and Fragile Contexts (The Case of the Occupied Palestinian Territory)

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### Abstract

*The article explicates the conditions in which evaluators in the occupied Palestinian territory (oPt) find themselves due to the realities of the occupation and the conflict-affected and fragile context. It explains the challenges evaluators in the oPt have experienced while conducting evaluations during the last 20 years since the establishment of the Palestinian National Authority in 1994. The evolution of the role of evaluators during the past decade in light of these challenges is presented including what evaluators have been doing to protect and promote social justice, and the strategies used to do so. The article concludes with suggestions on the role evaluators can play in protecting and promoting social justice in other countries in the region and other similar contexts based on the Palestinian experience. © 2015 Wiley Periodicals, Inc., and the American Evaluation Association.*

In addition to the abounding challenges evaluators often face wherever they work, evaluators in the occupied Palestinian territory (oPt) encounter numerous political, logistical, methodological, and ethical challenges. Many of these challenges are directly linked to the political situation caused by the continuous occupation of the oPt since 1967 and the predominantly volatile political circumstances that have dominated the scene since the failure of the peace process between Israel and the Palestinian Liberation Organization (PLO). Several of the obstacles confronting oPt evaluators are similar to those evaluators in other conflict-affected contexts often experience (see Bush & Duggan, 2013, for a further discussion of the different classification of these challenges in conflict-affected and fragile contexts).

Despite the political situation, and the continued existence of many of the obstacles involved when working in such a challenging context, evaluators in the oPt have made a significant breakthrough in their role during the past decade. Not only have evaluators in the oPt been very active in raising the importance of evaluation in general, but they have been successful in enhancing their role in protecting and promoting social justice and equality as well.

The article draws on the conceptualization of social justice, usually labeled “justice as fairness” (Rawls, 1999). According to Rawls, social justice denotes ensuring and guarding equal access to civil freedoms, human rights, and opportunities, and protecting the least privileged members of society.

## Context

In the oPt, the process of state-building began with the establishment of the Palestinian National Authority (PNA) in 1994 after the signing of the Oslo Accords and Agreements between Israel and the PLO. The Oslo framework set out a five-year process to reach a final resolution of the long-lasting Israeli–Palestinian conflict. The framework expired in May 1999 without reaching a resolution of the final status issues. Since then, the international community has introduced a series of peace initiatives. All efforts have failed, however, and the occupation regime has tightened following the eruption of the Second Palestinian Uprising (Intifada) in late September 2000. Since then, the daily life of the Palestinian people has been shaped primarily by the realities of the Israeli occupation.

Following its takeover of Gaza in June 2007, Hamas claimed full control of the Gaza Strip and removed PNA officials. After the takeover, two separate Palestinian governments reigned, one in the West Bank and one in the Gaza Strip. Sanctions imposed against the PNA after Hamas’s victory in the Palestinian legislative elections in January 2006 and the formation of the Hamas-led unity government were terminated in the West Bank

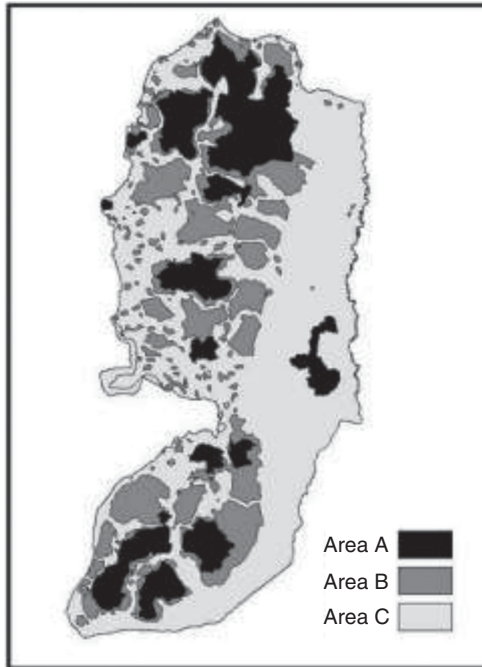
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after the takeover of Gaza in 2007. In Hamas-controlled Gaza, however, sanctions were replaced by a severe blockade and military measures introduced by Israel, as well as a political and financial boycott by members of the Quartet (the United States, the European Union, the United Nations, and Russia). As some commentators have noted, “the Hamas takeover of the Gaza Strip marked the beginning of a new social, economic, and political era for Palestine” (Qarmout & Beland, 2012, p. 32). Despite the recent reconciliation agreement between Fatah and Hamas signed in April 2014, the West Bank and the Gaza Strip remain politically divided.

East Jerusalem also remains under full Israeli control, isolating the city from the rest of the oPt. The PNA does not have any real sovereignty over the city. The Israeli settlements built on the oPt in the West Bank and East Jerusalem continue to play a major role in complicating the political, economic, and social realities of the Palestinian people. Roadblocks and checkpoints installed from the north to the south of the West Bank by the occupation authority remain one of the most difficult challenges facing the people in the West Bank. Settlements are considered illegal under international law, and members of the international community frequently

**Figure 9.1. Map of the West Bank Illustrating Areas A, B, and C**



Source: Gordon (2008, p. 178).

condemn their existence and expansion (UNISPAL, 1980). The Israeli separation wall built along and within the West Bank constitutes another significant challenge facing the Palestinian people. Additionally, three district administrative divisions exist in the West Bank: Areas A, B, and C. While Area C<sup>1</sup> represents 61% of the total area of the West Bank and is seen as fundamental to the viability of the future Palestinian state, it is under full Israeli civil and security control (except over Palestinian civilians) and only 1% of it is allocated for Palestinian development (International Labour Organisation, 2012, p. 4). Figure 9.1 illustrates the three district administrative divisions of the West Bank.

The PNA is heavily dependent on foreign aid. Palestinians living in the West Bank and Gaza have been among the world's highest per capita recipients of foreign aid since the signing of the Oslo Accords and the establishment of the PNA in 1994 (Zanotti, 2014, p. 1). Despite this unprecedented volume of foreign aid, the oPt still lags behind most neighboring countries in the MENA region in most social development indicators.

While the oPt did not take an active part in the "Arab Spring" revolutionary movements, a limited number of demonstrations calling for the resignation of the then nondemocratically appointed government in the West Bank were observed in several cities in late 2012. Social justice, equality, and improved economic policies were among the most prominent demands of the protesters. Such protests continued, but on a smaller scale.

## **Challenges**

Against the previously mentioned circumstances, evaluators are greatly needed in the oPt. Their role is not only vital in evaluating the effectiveness of development efforts, but also in protecting and promoting social justice and equality with the ethical responsibility they have as evaluators (Ericson, 1990). Nonetheless, evaluators in the oPt have been faced with several political, logistical, methodological, and ethical challenges that are directly linked to the sociopolitical situation. The next section presents a number of these challenges that are linked to protecting and promoting social justice and equality.

### **Lack of a Strong Evaluation Culture**

Similar to many developing countries, the oPt lacks a strong evaluation culture. When monitoring and evaluation (M&E) units and departments were established in most international, and then national, organizations in Palestine during the early 2000s, they were perceived as a mere donor requirement. Much focus was spent on accountability, rather than on learning. M&E staff and managers were mainly international, coming from the same donor country that financially supported the specific organization, project or program. To many, both the monitoring and evaluation functions,

especially evaluation in this case, were seen as no more than a waste of the limited resources to fulfill a donor requirement.

A reverse trend started from the mid-2000s. Policy makers increasingly started to observe the importance of the data and findings provided by their M&E units and departments. In addition, M&E became more prominent internationally after the 2005 Paris Declaration on Aid Effectiveness, which focused on achieving results and the necessity that recipient countries measure these results themselves. Palestinian M&E professionals slowly started to replace their international counterparts in the different projects' and programs' M&E units and departments. M&E units were also established at different governmental institutions, and national development strategies and plans requested that governmental institutions pay more attention to monitoring and evaluating their interventions.

Despite progress, however, evaluation is still not largely accepted, whereas it should be embraced. Many policy makers interpret evaluation as a lack of trust and goodwill when it critiques a certain policy, program, or project. This is especially true for policy makers and implementers, who see the role of evaluation as highlighting successes that could help them in their fundraising efforts.

During the past decade evaluators in the oPt have been playing a significant role to enhance the evaluation culture and promote a more enabling environment for evaluation. The struggle to improve the evaluation culture and principles itself reinforces the place evaluators have while working with other groups and social movements that are calling for enhanced social justice and equality.

### **Restricted Access and Mobility**

As mentioned above, the three main parts of the oPt (the West Bank, the Gaza Strip, and East Jerusalem) are governed by three different authorities. Israel has full sovereignty over East Jerusalem, which it occupied in 1967; the PNA controls parts of the West Bank and Israel controls the rest of it; and finally, Hamas (after the takeover in 2007 and despite the recent reconciliation agreement) still governs the Gaza Strip, but does not control most of its borders. Evaluators in the oPt find it extremely difficult to travel across these three regions. For example, evaluators working in the West Bank cannot travel to Gaza without a prior permit from the Israeli Defense Forces (IDF), the Hamas security forces, and an initial agreement from the PNA in the West Bank. To visit Jerusalem, evaluators in the West Bank need a special permit from the IDF; and evaluators from Gaza find it extremely difficult to obtain the necessary permit from Israel to visit the West Bank or East Jerusalem.

Even within the same area, it is often very difficult to reach the different communities due to political and security related constraints. Generally speaking, Area C of the West Bank is not readily accessed by Palestinian

evaluators. Many of the communities adjacent to the Green Line<sup>2</sup> are split into two parts, one in Israel and the other in the West Bank. The separation wall enforces these newly drawn borders.

When planning and conducting evaluations, evaluators in the oPt are confronted with several obstacles due to restricted access and mobility. These can be political, technical, and methodological. For example, the fact that local evaluators are restricted from certain areas and regions causes underrepresentation of a certain population being included during the evaluation. Statistically representative samples are often very difficult to obtain. Key stakeholders to be interviewed cannot be reached by evaluators. Site observations are often limited to restricted areas in which the evaluator works. Even when evaluators ask key informants to come to the areas they have access to, many of them cannot attend due to the restricted mobility and the political and security situations. When key informants manage to attend, however, it often entails a significant increase in the evaluation costs due to additional transportation expenses.

International evaluators who work in the oPt face similar challenges. Nevertheless, they enjoy greater access and mobility than their Palestinian counterparts. Hence, many organizations and institutions might prefer to hire international, rather than local Palestinian, evaluators. While this could be seen as a good solution to the problem of access and mobility and to ensure a more rigorous methodology, in fact the quality of the evaluation could be compromised due to inadequate understanding of the local context by international evaluators. Recently many organizations have started to opt for an evaluation team composed of local and international evaluators. Although this is seen as a good solution, many organizations lack the necessary means and needed financial resources to do so.

The lack of strong evaluation capacity in the oPt is also directly linked to access and mobility. Palestinian evaluators find it extremely difficult to travel, hold meetings, and organize themselves in professional networks. The Palestinian Evaluation Association (PEA), launched in early 2013, constitutes a basis of hope in this regard. Nonetheless, since its inception, the PEA has failed to convene evaluators from the West Bank and Gaza, other than in virtual meetings via the Internet. As a Palestinian organization, and unlike international NGOs and donor agencies, the PEA cannot obtain permits for its members to travel between the West Bank, Gaza, and East Jerusalem.

### **Occupation as the Scapegoat**

The PNA and several local and international NGOs, who often see occupation as the main reason behind any failure, expect evaluators to highlight the impact of the occupation on the degree of success of their policies, programs or projects. This approach allows the implementer to judge any success, even if limited, as greatly significant, and any failure as a natural

consequence of the occupation. If evaluators do not agree, and highlight other factors that may explain any shortcomings or failure, despite occupation and its often negative influence, their work might be seen to misunderstand the local context or to underestimate the negative impacts of the Israeli occupation. Hence, evaluation findings are subjected to harsh criticism if they do not include, on the top of the list of findings, the role of the Israeli occupation and its related negative impact. Many evaluations do find that the Israeli occupation indeed proves to have a significant negative influence. In most instances, however, there is a complex interplay of other factors that contribute to the findings. While evaluators like to present these challenges, implementers often focus on the one they like to see topping any list, the negative impact of the occupation.

In many instances, this largely ethical challenge constitutes an important barrier to including findings and recommendations that can highlight what implementers should improve in order to be more effective and to consider social justice and equality aspects of their work. Even when evaluators manage to include such findings and recommendations, and the explanations why implementers could do better despite the political challenges, many implementers often insist on undermining such findings.

### **Protecting and Promoting Social Justice and Equality**

During the first ten years since the establishment of the PNA in 1994, evaluators in the oPt played a rather minimal role in promoting social justice. In fact, evaluators in the oPt played a rather negligible role in development efforts in general between 1994 and 2004. The reasons behind this minimal role include (a) the political and security challenges caused by the occupation and the overall political instability; (b) the small number of evaluation professionals and their limited evaluation capacity; (c) the absence of a network that unites Palestinian evaluators; and (d) the lack of a strong evaluation culture in general. Nonetheless, it has been observed that since 2004, evaluators in the oPt have started to play an increasingly greater role in general and in protecting and promoting social justice and equality in particular. This development in the evaluators' role occurred despite the existence of many of the challenges discussed, most importantly the political and security challenges, due to important developments presented here.

In most evaluations conducted in recent years, evaluators have not been satisfied with merely investigating how successful an intervention is in achieving its set goals and objectives; they have also investigated how well these goals consider social justice and equality issues. Through their evaluation work, evaluators often assess the degree in which different stakeholders and beneficiaries have contributed to the design of the evaluated policy, program, or project. They also assess whether the evaluated policy, program, or project is targeting members of society who are often excluded, most importantly those who live in extreme poverty, people with

disabilities, unemployed, refugees, youth, and women members of these groups, as well as women in general.

In their work, evaluators advocate for the use of the equality-focused and gender-responsive evaluation approach, despite resistance from project and program managers and policy makers. They sometimes question evaluators' mandate to do so, claiming that evaluators' role is merely to assess the success or failure of a certain intervention and provide recommendations in this regard.

Indeed, evaluators often find themselves in a relatively weak position to critically assess an intervention based on the degree to which it considers social justice and equality when there is a specific set of evaluation questions precisely asked in the evaluation terms of reference (ToR) and no mention of evaluating the intervention's consideration of social justice and equality issues. Many evaluators started to combat this obstacle by working to enhance the evaluation culture in general, explaining the ethical responsibility evaluators have to critically evaluate any intervention and negotiate evaluation questions as they appear in the ToR if they neglect social justice and equality issues.

Evaluators are not only calling for the inclusion of the neglected segments of society through the evaluation reports they are producing, but they are also publishing opinion articles in some of the most widely read local newspapers and news websites calling for social justice and equality in the overall development efforts that are taking place in the oPt. Advocacy campaigns that aim to open the public's eyes to the significant role of evaluation in protecting and promoting social justice are among the most important techniques used by evaluators to promote both evaluation and the role of evaluation in protecting social justice and equality in the governmental and nongovernmental development interventions.

In addition, many evaluators are becoming less satisfied with merely blaming the occupation for all development challenges in the territory. They are calling for enhanced governmental performance, better donor coordination, and improved interministerial cooperation, according to national plans and priorities. Moreover, while the Palestinian Legislative Council (PLC) has been unable to meet and govern since 2007 due to the Israeli imprisonment of several members, the Fateh– Hamas conflict, and the indefinite postponing of elections by the Fateh leadership in the West Bank and the Hamas leadership in Gaza, efforts have been initiated to work closely with some PLC members to promote evaluation and social justice.

Furthermore, due to the blockade and the political separation between the West Bank and Gaza, Palestinians in the Gaza Strip are often excluded from many of the development interventions that have occurred in the oPt since 2007. Even with interventions that are implemented in both the West Bank and Gaza, managers and policy makers often advise evaluators not to travel to Gaza in order to interview different beneficiaries and stakeholders due to mobility challenges or the dangers evaluators may subject



themselves when travelling. Many evaluators in the oPt do not find this approach appropriate, and they are seriously concerned that Palestinians in the Gaza Strip are not benefiting from these development efforts due to political considerations. Hence, many evaluators ask client organizations and institutions to request the occupation authorities to issue entrance permits to Gaza, despite the assumed risks. If these efforts fail, evaluators often try to make contact with key informants in Gaza via the Internet or telephone. Evaluators are currently calling on the PNA, Hamas, and the international donor agencies active in the oPt to put an end to this unequal and unjust treatment of the two parts of Palestine.

Hence evaluators are giving voice to the often-unheard indigent segments of society, and, indeed, reach members of society that many interventions do not. By doing so, evaluators not only play a more significant role through their normal evaluation work, but also as protectors and advocates of social justice, which is often most violated during conflict periods. Ultimately, the efforts evaluators dedicate to protecting and promoting social justice in their communities and countries can arguably lead to a reduction in the level of damage caused by conflict on community members affected.

## Conclusions

The past two decades saw the establishment of the PNA and the state-building and national development efforts that came with its establishment. This period has also witnessed the failure of the peace process between the PNA and Israel and the tightening of the occupation regime after the Second Palestinian Uprising in late 2000. During the first half of this critical period, the role of evaluators in the overall Palestinian development efforts and in promoting and enhancing social justice was rather minimal. This inconsequential role can be attributed to the abounding political and security challenges caused by the Israeli occupation; the weak evaluation capacity and the limited number of evaluation professionals; the absence of a common entity that unites Palestinian evaluators; and the lack of a strong evaluation culture. Despite the continued presence of many of the political and security challenges, however, the past 10 years saw significant positive developments in the role of evaluators in the oPt in general and in their role in promoting social justice and equality in particular.

In part, the change can be attributed to the enhancement of the evaluation capacity of these evaluators and to the creation of the PEA, an entity that unites evaluators in Palestine, building and sustaining alliances with other evaluators and regional and international evaluation networks, and ultimately enhancing the evaluation culture in the oPt.

This article argues that despite the continued existence of political unrest in the oPt, and in similar conflict-affected situations, evaluators can play a greater role by adopting approaches and strategies that enhance their capacity, better unite their voices, unify their messages, and advance

evaluation cultures in their communities and countries. One of the best approaches to achieving such changes can be accomplished through alliances with evaluators and evaluation networks regionally and internationally. Many evaluators no longer feel isolated in their demands and promotion of social justice and equality as they gain much-needed support through the regional and international alliances they build.

Evaluators in other countries, especially in neighboring “Arab Spring” countries and in other conflict-affected and fragile states, may learn from the Palestinian experience in this regard. Palestinian evaluators are disseminating lessons learned through the communities of practice they take part in with their colleagues in the Middle East and North Africa Evaluators Network (EvalMENA), EvalPartners, and the International Organization for Cooperation in Evaluation (IOCE), where protecting and promoting social justice is a central focus.

## Notes

1. Area C includes all Israeli settlements (cities, towns, and villages), nearby land, most roadways that connected the settlements (and which are exclusively for Israeli use) as well as strategic areas described as “security zones” by the Israeli occupation forces.

2. The Green Line is a demarcation line set out after the 1949 Armistice Agreements between Israel on the one hand and Egypt, Jordan, Lebanon, and Syria on the other hand after the 1948 War. It is now used to mark the lands Israel occupied during the 1967 Six-Day War, namely, the West Bank, Gaza Strip, and Golan Heights.

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