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Prepared by

Margarida Rodrigues

Trainee at Operations Evaluation

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1 INTRODUCTION

Gender equality is the goal of equal rights, responsibilities and opportunities for women and men and for girls and boys. To achieve that goal, “the interests, needs and priorities of women and men are taken into consideration, recognizing the diversity of different groups of men and women.”¹

Around the world, in developed and developing countries, gender inequality persists. Women and men do not have the same rights, responsibility and opportunities in all realms of life, such as employment, education, personal integrity and self-realization, access to financial services, entrepreneurship and decision-making power. Global women’s labor force participation is currently at 52 per cent while men’s is 77 per cent. This statistic is significantly lower in certain regions, such as North Africa and the Middle East, where women’s labor force participation rate is 25 per cent. When women are in paid work, they earn 10 to 30 per cent less than men, with the gap varying widely across countries and regions. In the European Union, the gender pay gap is estimated to be approximately 16.4 per cent (percentage of average gross hourly earnings of male paid employees), with large variations across EU countries. In access to education, women make up two thirds of the 774 million adult illiterates. In Sub-Saharan African, there are an estimated 28 million young and adolescent girls who are out of school. Regarding access to financial services, inequalities between and women and men exist. 58 per cent of women globally have access to a bank account, versus 65 per cent of men.

Although significant progress has been made in achieving gender equality, the goal is still valid and important for all regions of the world, including the European Union. Several strategies have been put in place to pursue the goal, including the European Union’s Strategy on Equality between Women and Men, and the Gender Action Plan 2016-2020. Gender mainstreaming, adopted globally at the 1995 Fourth World Conference on Women, in Beijing, has been the preferred strategy for the pursuit of gender equality. It has been adopted by the United Nations, the European Union, international financial institutions, donor organizations and governments worldwide. It has been met with mixed reviews, but achieved positive results, while failing to completely incorporate gender equality into the “DNA” of organizations.

This report addresses gender mainstreaming at an institutional and project level, focusing on practical tools and methods to mainstream gender equality to ex-post evaluations. Section 2 carries out a literature review of gender mainstreaming and gender mainstreaming to evaluations, as well as a policy review of the European Union’s gender policy. Section 3 presents and discusses practical tools and methods for mainstreaming gender to ex-post evaluations.

2 GENDER MAINSTREAMING

2.1 Literature review

2.1.1 Concepts

Gender equality is the goal of equal rights, responsibilities and opportunities for women and men and for girls and boys. It means that “...the interests, needs and priorities of both women and men are taken into consideration, recognizing the diversity of different groups of men and women.”² The objective is not to promote sameness between women and men, but equity, recognizing that other characteristics, such as race, poverty level and ethnic group also impact on the rights, responsibilities and opportunities given to an individual, and

It is important to understand why “gender”, and not “sex”, is the term used to discuss equality between women and men. While “sex” refers to the biological characteristics of a person, gender is a social construction, which “...refers to the social attributes and opportunities associated with being male and female and the relationships between women and men and girls and boys, as well as the relations between women and those between men. These attributes, opportunities and relationships are socially constructed and are learned through socialization processes. They are context and time specific and changeable.”

¹ UN Women. “OSAGI Gender Mainstreaming- Concepts and definitions”.

Available at: www.un.org/womenwatch/osagi/conceptsanddefinitions.htm

² *Ibid.*

intersect with gender.

The concept of **gender mainstreaming** was first elaborated in 1985 by the UN development community at the 3rd World Conference on Women in Nairobi, and formally accepted as an international strategy ten years later, at the 4th World Conference on Women in Beijing, in 1995. The standard definition of gender mainstreaming is the one provided by the Economic and Social Council of the United Nations (ECOSOC) in 1997:

*“Mainstreaming a gender perspective is the process of **assessing the implications for women and men of any planned action**, including legislation, policies or programmes, in all areas and at all levels. It is a strategy for making women’s as well as men’s concerns and experiences an integral dimension of the design, implementation, monitoring and evaluation of policies and programmes in all political, economic and societal spheres, so that women and men benefit equally and inequality is not perpetuated. **The ultimate goal is to achieve gender equality**”³*

Mainstreaming gender requires considering the impact on gender equality of any planned action, regardless of whether the action is focused on gender. It also requires integrating gender perspectives into all stages of a planned action. Finally, gender mainstreaming is clearly stated as a process and not the goal. The goal therefore is not gender mainstreaming in itself, but gender equality.

Gender equality is often pursued using a “dual” strategy that combines gender mainstreaming with specific measures oriented at empowering women.⁴

There are several tools that are generally used to implement gender mainstreaming. These are:

- Gender strategy;
- Gender action plan;
- Gender analysis;
- Gender-sensitive stakeholder identification, analysis and engagement;
- Sex-disaggregated data;
- Toolkits, Handbooks, manuals and guidelines;
- Checklists;
- Gender marker.

Women's Empowerment

- Sense of self-worth
- The right to have and to determine choices
- The right to have access to opportunities and resources
- The right to have power to control their own lives, both within and outside the home
- The right to influence the direction of social change to create a more just social economic order

(UNFPA, Secretariat of the United Nations Inter-Agency Task Force on the Implementation of the ICPD Programme of Action)

2.1.2 Review

Most organisations have adopted gender mainstreaming. Its effectiveness in achieving gender equality, however, has received mixed reviews. An assessment of 26 evaluations of gender mainstreaming in donor organisations, carried out by the **Operations Evaluations Department (OPEV) of the African Development Bank (AfDB)**⁵, found a number of obstacles to the implementation of gender mainstreaming that organisations must still overcome.

³ United Nations. (1997) *Report of the Economic and Social Council for 1997*. A/52/3.18 Available at: <http://www.un.org/documents/ga/docs/52/plenary/a52-3.htm>

⁴ Levy, Caren. *Gender Justice and Development Policy: Is ‘Gender Mainstreaming’ Up to the Challenge?* Available at: www.ucl.ac.uk/~ucugw3i/files/ISID6/ISID_Caren_Levy_Gender_Justice_and_Policy.pdf

⁵ Independent Evaluation Group, African Development Group (OPEV) (2012). *Mainstreaming Gender Equality, A Road to Results or a Road to Nowhere?* Tunis: African Development Bank.

One of the obstacles is the fact that **leadership in organisations has not consistently prioritised gender mainstreaming**. The OPEV found that senior management has failed to actively commit to gender mainstreaming and put in place the necessary systems and resources to implement it effectively, at least on a consistent basis. This may be attributed to competing priorities for organisations' leadership that have tended to overshadow gender equality. In donor agencies, priorities such as poverty reduction, anti-corruption actions and climate change mitigation have often supplanted the goal of gender equality. Another factor may be the lack of career incentives and lack of accountability for leadership to implement gender mainstreaming. Finally, the study observed that there was gender inequality within the donor organisations themselves, which may also contribute to the failure to prioritise gender mainstreaming. In the organisations assessed, men overwhelmingly occupied the majority of leadership positions.

Another finding of the study was that **financial and human resources have not been sufficient to effectively mainstream gender equality** to donor agencies' interventions. The number of gender experts has been insufficient and organisations have been largely unable to determine the amount of financial resources needed to implement gender mainstreaming.

Perhaps contributing to the lack of incentives and accountability is the observation that **results reporting and learning have been constrained by inconsistent approaches to monitoring and evaluation**. The OPEV notes that there has been a lack of supervision and monitoring and evaluation systems across donor agencies that are able to record gender results and document good practice. The evaluators add that even when gender is integrated at the design stage, it is often not followed through in implementation and monitoring. The best tracking of results was observed in education and health interventions. Moreover, outside of gender-themed evaluations, gender results have not been a priority within the evaluation teams of the agencies reviewed.

In "Beyond Repetitive Evaluations of Gender Mainstreaming"⁶, Rita Brouwers reviewed the implementation of gender mainstreaming taking place between 2000 and 2012. The author reported the observations of a 2003 Review of Gender and Evaluation, carried out by the [Organisation for Economic Cooperation and Development and the Development Assistance Committee \(OECD/DAC\)](#). The review made several important conclusions regarding the implementation of gender mainstreaming. First, gender mainstreaming was more often seen as goal rather than a means to achieve gender equality. This stemmed from the prevailing assumption that gender mainstreaming in itself is sufficient to achieve gender equality. The reviewers also found that "gender" was often regarded as synonymous with "women" and little focus was placed on gender power relations. Additionally, most of the gender benefits identified pertained directly to women's practical needs instead of strategic interests.

In 2012, Brouwers reviewed 21 gender evaluations carried out during the following decade by the evaluation departments of bilateral and multilateral agencies. A main observation is the rift that exists between policy and implementation policy was found to be "inconsistent, ambiguous, and confusing; invisible and unclear; not implemented systematically."⁷ Gender performance was best in the areas of education, health, nutrition, water supply and sanitation, population, agriculture and rural development and worst in infrastructure, transport, energy, program loans, and private sector development." On a more positive note, gender analysis has been increasingly used in country strategies, where it is a valuable instrument to assess gaps between women and men. Although the analysis has not been used effectively at a programme level, it has been better applied at the project level. For example, the review determined that two thirds of World-Bank's gender-

The concept of gender mainstreaming may not require lobbying anymore, walking the talk does

⁶ Brouwers, Rita. (2014). "Beyond Repetitive Evaluations of Gender Mainstreaming." In *Evaluation Matters- Gender Inequality and You*. Tunis: African Development Bank.

⁷ Brouwers, 2014, p.32.

integrated projects delivered good outcomes.⁸ All in all, the author argues that the conclusions made about gender mainstreaming in 2003 by the OECD/DAC Review still largely held true for the period 2005-2012.

2.2 Evaluations

The United Nations Evaluation Group (UNEG) defines evaluation as:

*“...an assessment, as systemic and impartial as possible, of an activity, project, programme, strategy, policy, topic, theme, sector, operational area, institutional performance, etc....It aims at determining the relevance, impact, effectiveness, efficiency and sustainability of the interventions and contributions of the organizations of the UN...”*⁹

Gender-responsive evaluations integrate gender considerations in their purpose, process and methods. There are two dimensions to mainstreaming gender to evaluations- results and process. Results-wise, evaluations must assess the extent to which an operation was guided by the gender objectives of the organisation, and to which extent it has achieved those objectives. Process-wise, they examine how and to what extent gender was mainstreamed in the operation's programming process and also apply gender equality mainstreaming to the evaluation process.

UN Women goes further in their definition of evaluation, by directly incorporating principles of gender equality:

*“...a systematic and impartial assessment that provides credible and reliable evidence-based information about the extent to which an intervention has resulted in **progress (or lack thereof) towards intended and/or unintended results regarding gender equality and the empowerment of women**”*¹⁰

As has been observed throughout several reviews of gender-responsive evaluations an important condition for the successful mainstreaming of gender to evaluations is the existence of systematic organisation-wide good practises. The UNEG norms for evaluation, for instance, include clauses that specifically address gender equality. Concerning the design of methodologies:¹¹

- *“...Methodologies should explicitly address issues of gender and under-represented groups”*
- *“Evaluations must be gender and culturally sensitive and respect the confidentiality, protection of source and dignity of those interviewed.”*
- *Evaluations should indicate:*
 - *“how gender issues were implemented as a cross-cutting theme in programming , and if the subject being evaluated gave sufficient attention to promote gender equality and “whether the subject being evaluated paid attention to effects on women and individuals/groups who are marginalized and/or discriminated against”*
 - *“how gaps were identified in the capacity of rights holders to claim their rights, and of duty bearers to fulfil their obligations, including an analysis of gender and individuals/groups who are marginalized and/or discriminated against, and how the design and implementation of the subject being evaluated addressed these gaps.*

⁸ IEG (Independent Evaluation Group, World Bank Group) (2010). *Review of Gender and Evaluations: Final Report to DAC Network Support 2002-2008*. Washington, DC: World Bank.

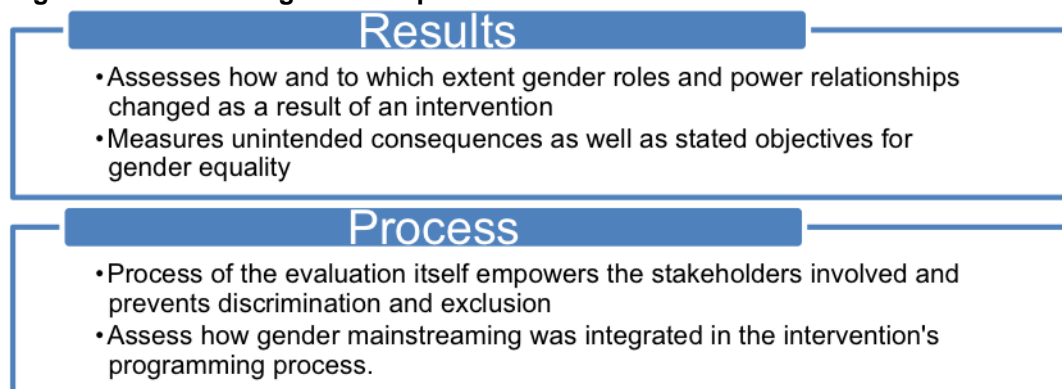
⁹ United Nations Evaluation Group (UNEG) (2005). *Norms for Evaluations in the UN*. System/ UNEG/FN/Norms. New York: UNEG P.5 Available at: www.uneval.org/document/detail/21

¹⁰ Independent Evaluation Office (2015). *How to Manage Gender-Responsive Evaluations*. New York: UN Women. P. 4

¹¹ United Nations Evaluation Group (UNEG) (2005). *Standards for Evaluation in the UN System*.

UNEG/FN/Standards. Available at: www.uneval.org/papersandpubs/documentdetail.jsp?doc_id=22 and United Nations Evaluation Group (2005). *Norms for Evaluation in the UN System*. < Available at: www.uneval.org/papersandpubs/documentdetail.jsp?doc_id=21>

Fig.1: Dimensions of gender-responsive evaluations



2.2.1 Review

Several studies have examined the effectiveness of evaluations in measuring the gender results of projects, programmes and policies.

The Independent Evaluation Office (IOE) of the International Fund for Agricultural Development (IFAD) reviewed 59 general evaluations¹² undertaken by the evaluation units of 6 multilateral agencies. A key observation of the study was that there were weaknesses in the results frameworks and objectives, which impacted the quality of operations and of the evaluations themselves. The evaluations reviewed indicated that performance in promoting gender equality could have been stronger if the policies and associated results frameworks that set objectives, targets and measures had been stronger.¹³ Objectives for gender equality tended to focus mostly on women and less so on relationships between women and men, and were often vaguely worded, setting objectives such as “women’s empowerment”. In turn, weaknesses in the objectives impacted the quality of the evaluations, as achievements are evaluated against stated objectives. In fact, the study found some evidence that agencies with more robust policies and results frameworks were able to better capture results and use information for learning. All in all, the lack of clarity in results framework’s objectives, as well as the lack of specific targets and clear indicators, contributes to weakness in results reporting. Evaluations were especially inadequate in including gender gender-sensitive considerations in projects that were not designed with a gender focus. The authors suggest that evaluation units that give clear instructions to include gender in all evaluations perform better.¹⁴

The study carried out by the Operations Evaluations Department (OPEV) of the African Development Bank (AfDB), which looked at 26 evaluations of gender mainstreaming policies taking place between 1990 and 2010, found several inadequacies in results reporting. This was partially attributed to a lack of systematic organisation-wise good practices for monitoring and evaluation and partially attributed to the lack of gender integration in project design and monitoring. This observation is backed by other studies, such as a Norad review of 63 evaluations, which found that 38 did not include any reference to gender and that, among the 24 evaluations that were gender-focused, only 12 included information about women’s needs and interests.¹⁵

An important cause for the inadequacy of gender results reporting may stem from the lack of gender integration in intervention design and monitoring. Most projects lacked specific monitoring requirements to assess gender impacts and most evaluations did not include gender assessments.¹⁶ Project design, monitoring and evaluation were found to be most coherent for projects in the human development sectors (education, health, social protection) and, to a lesser extent, in microfinance, providing a better basis for results reporting.¹⁷

¹² “General evaluations” in this context refers to evaluations of regular interventions that are not gender-themed

¹³ Independent Office of Evaluation of IFAD (2012). *Gender Equality and Development Evaluations Units: Lessons from Evaluations of Development Support of Selected Multilateral and Bilateral Agencies*. Rome: IFAD.

¹⁴ *Ibid*

¹⁵ Norad (2005). *Gender and Development: A Review of Evaluation Reports 1997-2004*. 2006/1. Oslo: Norad.

¹⁶ OPEV, 2012.

¹⁷ *Ibid*.

In "Beyond Repetitive Evaluations of Gender Mainstreaming" author Ria Brouwers details the findings of the study done in 2003 by the [Organisation for Economic Cooperation and Development and the Development Assistance Committee \(OECD/DAC\)](#) with the intent to uncover how gender results were addressed in the evaluations of development policy and practice. The study concluded that "overall progress in incorporating gender perspectives into general evaluations¹⁸ has been slow and uneven."¹⁹

In the following decade, Brouwers examined 21 evaluations of gender policies, done between 2005 and 2011. She found that the evaluations generally focused on policy relevance, commitment of management and staff and whether gender issues were reflected in strategies and project design. Less attention was given to results. Notably, very little focus was placed on money flows. Allocation of money was often described in vague terms such as "lack of" and "inadequate", without mentioning specific figures. The Department of International Development of the UK (DFID) explains that "*financial figures concern the whole project in which gender will be mainstreamed, the figures are registered at the design stage, but how much of the budget is actually spent for the promotion of gender equality is never separated out. Gender equality activities in smaller projects may not be included at all*".²⁰

Across the board, studies point to the inadequacy of evaluations in assessing gender results. Many evaluations do not mention gender unless there is a gender focus to the operation, and when they do, they often fall short of assessing the strategic implications of a policy, programme or project for women's interests and needs. This may be explained by flaws in the methodology of the evaluations, as well as in the overall implementation of gender policies in organisations. The lack of gender integration in project design and monitoring, as well as unclear objectives and targets and weak results frameworks, pose challenges for a quality assessment of gender results.

2.3 EU policy review

The concept of gender mainstreaming was first formally elaborated in 1985 by the UN development community at the 3rd World Conference on Women in Nairobi.²¹ The concept was also used within the European Community, albeit on a non-systematic basis, during the decade that preceded its official recognition as an international strategy, at the 4th World Conference on Women in 1995. It first entered an official document of the European Community in 1991, as a small element of the 3rd Action Programme for Equal Opportunity (1991-1996) but was not applied during that multiannual period.²² When gender mainstreaming was adopted as an international strategy at the 4th World Conference on Women in Beijing, the European Community was finally ready to embrace it as the key approach to gender equality.

The European Commission gave its definition of gender mainstreaming in February 1996, in its Communication on *Incorporating Equal Opportunities for Women and Men into all Community Policies and Activities*, where it established that:

"(...) in all phases of the political process – planning implementation, monitoring and evaluation – account is taken of the gender perspective. The goal is the promotion of gender equality between women and men. Under Gender Mainstreaming, all policy measures must constantly be monitored for their effects on the life situation of women and men and, if necessary, revised (...) gender mainstreaming involves not restricting efforts to promote

¹⁸ "General evaluations" in this context refers to evaluations of regular development interventions that are not specifically designed to evaluate gender equality policy initiatives

¹⁹ Hunt, Juliet, and Ria Brouwers.(2003). *Review of Gender and Evaluation: Final Report to the DAC Network on Development Evaluation*. Paris: OECD.

²⁰ DFID (Department for International Development, U.K.) (2006) "Annex 4 Gender Analysis of DFID's Aid Portfolio (1995-2005)." In *Evaluation of DFID's Policy and Practice in Support of Gender Equality and Women's Empowerment*. Evaluation Report EV669. London: DFID.

²¹ Pollack, Mark A., and Emilie Hafner-Burton. "Mainstreaming gender in the European Union." *Journal of European Public Policy* 7.3 (2000): 432-456

²² *Ibid*

*equality in the implementation of specific measures to help women but mobilizing all general policies and measures specifically for the purpose of achieving equality (...)*²³

Gender mainstreaming was then put into practice in the European Community in 1996 within the Fourth Action Programme for Equal Opportunities (1996-2001). The programme followed three consecutive programmes aimed at increasing women's participation in the labour market and eliminating discrimination in employment and occupation. The First and Second Action Programmes were a complement to the EU equal treatment Directives and were mostly limited to specific anti-discrimination measures in employment. The Third Action Programme, however, reflected the change in policy that was beginning to take place in the European Community, as it called for the integration of equal opportunities initiatives into the EC's economic and social policies²⁴. Finally, the Fourth Action Programme for Equal Opportunities embraced gender mainstreaming as the process to achieve gender equality. The program was followed by the Fifth Action Programme for Equal Opportunities. Both called for a gender dimension in all models, activities, policies and studies. Specifically, the programmes aimed to promote equal opportunities in education, vocational training and the labour market, as well as to promote women's participation in decision-making and to improve work-family balance for women and men.

After five Action Programmes, the EU adopted the "Roadmap for equality between women and men". Focus was placed on the elimination of pay differences between women and men, the improvement of work-life balance, the fight against human trafficking, and the support of gender budgeting and equal treatment within and outside the EU²⁵.

The current approach to pursuing gender equality in the EU rests on three approaches:

- Equal treatment legislation
- Gender mainstreaming
- Specific measures focused on women²⁶

These will be elaborated upon in the remainder of this section, considering the legislation and policy instruments currently in place in the European Union.

2.3.1 Legal framework

Equal treatment has its binding legal basis primarily in the Treaty of Lisbon (2009) in Article 157 TFEU, which establishes equal pay for equal work. The text provides that:

"1. Each Member State shall ensure that the principle of equal pay for male and female workers for equal work or work of equal value is applied.

(...)

3. The European Parliament and the Council (...) shall adopt measures to ensure the application of the principle of equal opportunities and equal treatment of men and women in matters of employment and occupation, including the principle of equal pay for equal work or work of equal value.

4. With a view to ensuring full equality in practice between men and women in working life, the principle of equal treatment shall not prevent any Member State from maintaining or adopting measures providing for specific advantages in order to make it easier for the underrepresented sex to pursue a vocational activity or to prevent or compensate for disadvantages in professional careers."²⁷

²³European Commission (1996). *Incorporating Equal Opportunities for Women and Men into All Community Policies and Activities*. Brussels: European Commission.

²⁴ Kwon, Rosa (1993). *Equal Opportunities for Women and Men: The Third Medium-Term Community Action Programme*, 16 B.C. Int'l & Comp. L. Rev. 161.

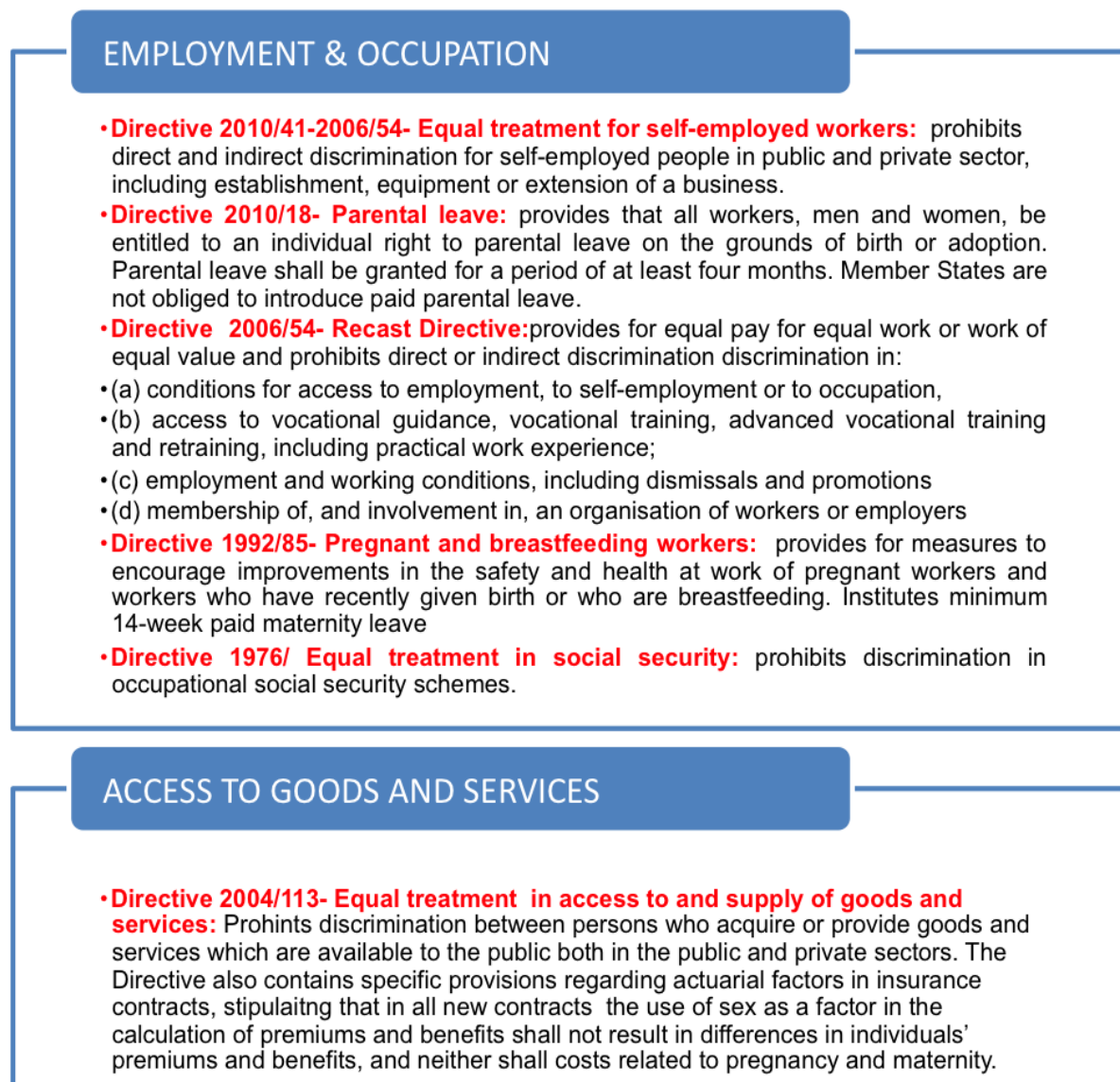
²⁵ European Commission (2015). *Gender equality - European Commission*. Available at: <http://ec.europa.eu/justice/gender-equality/>

²⁶ *Ibid*

²⁷ Consolidated Version of the Treaty on European Union art. 157, 2010 O.J. C 83/01

The Treaty Article is complemented by six Directives that focus on granting equal opportunities and equal rights to women and men, mostly in the field of employment and occupation. The relevant EU Directives for gender equality currently in place are described in the picture below.

Fig.2 Directives on gender equality



Certain concepts of the legal framework of the European Union are central to its policy on gender equality and are therefore important to clarify. These are direct and indirect discrimination and positive action.

Direct discrimination is defined in Directive 2006/54 and occurs:

"(...) where one person is treated less favourably on grounds of sex than another is, has been or would be treated in a comparable situation" (qtd. in Burri and Prechal, 2013)²⁸.

²⁸ Burri, Susanne, Sacha Prechal, and G. Unit (2008). *EU gender equality law*. Luxembourg: Office for Official Publications of the European Communities. P. 17

Discrimination based on pregnancy falls under a special category, as the Court of Justice of the European Union (CJEU) has established that comparison is not required to determine discrimination. Direct discrimination is overall prohibited across EU law (Burri and Prechal, 2013).

The status of indirect discrimination, on the other hand, is not as straightforward. Indirect discrimination is defined in Directive 2006/84 as:

*(...) where an apparently neutral provision, criterion or practice would put persons of one sex at a particular disadvantage compared with persons of the other sex, unless that provision, criterion or practice is objectively justified by a legitimate aim, and the means of achieving that aim are appropriate and necessary.*²⁹

Under EU law, a given measure constitutes indirect discrimination if it first disproportionately affects one gender over another, and is unnecessary for any legitimate purpose- other than that of discrimination. Truly eradicating indirect discrimination would achieve substantive equality. Gender mainstreaming goes a long way in fighting indirect discrimination, as it takes into consideration the gender implications of any given measure or policy. In promoting gender equality, the EU has adopted a mixed approach, combining gender mainstreaming with specific measures to advance women, such as affirmative action.

Positive action is thus another important legal concept to examine when reviewing EU policy on gender equality. The concept has legal basis in both the Treaty and Directives such as Directive 2006/84. Article 157 TFEU provides that:

*(...) the principle of equal treatment shall not prevent Member States from maintaining or adopting measures providing for specific advantages in order to make it easier for the underrepresented sex to pursue a vocational activity or to prevent or compensate for disadvantages in professional careers*³⁰

Such actions may take many different shapes. Targets and quotas in recruitment are directly targeted at increasing the number of individuals from underrepresented groups in certain positions, companies, or sectors, but other measures such as specific trainings may also fall under measures that confer specific advantages to an underrepresented group. EU law determines that, in the case of recruitment and promotion, targets and/or quotas can only be accepted if every candidature undergoes an objective assessment that considers the specific personal situations of all applicants. Case law regarding positive action began with strict interpretations by the CJEU, but the Court has adopted a more lenient position in recent years, in favour of positive action.³¹

2.3.2 Policy framework

As mentioned above, the strategy for gender equality pursued by the EU is threefold- equal treatment legislation, gender mainstreaming and specific measures promoting gender equality and the advancement of women. The legislation in place focuses mainly on the prohibition of gender-based discrimination within the EU. In addition to specific legislation, the European Union promotes gender mainstreaming, meaning that all policies should be assessed for their potential impact on gender equality. Finally, the EU has specific policy instruments in place to directly promote gender equality.

Presently, the central policy regarding gender equality in the European Union is the [“Strategy for Equality between Women and Men”](#) for the period 2010-2015. This Strategy is centred on the 5 priorities set in the Women’s Charter, adopted by the Commission in 2010. The Strategy provides the framework to mainstream gender into all policies that impact on these priorities. These are:

- Equal economic independence for women and men;
- Equal pay for equal work and work of equal value;
- Equality in decision-making;
- Dignity, integrity and an end to gender-based violence;

²⁹ Qtd. in Burri, Prechal and G. Unit, 2008, p. 18

³⁰ Consolidated Version of the Treaty on European Union art. [157], 2010 O.J. C 83/01

³¹ Burri, Prechal and G. Unit, 2008.

- Gender equality beyond the European Union.³²

The Strategy is a policy instrument that falls under the category of Commission Communications and has no legal effect.³³ It sets out the Commission's approach to the topic of gender equality and specifies which actions it intends to carry out in order to achieve its objectives. It does not, however, set legally binding norms for Member States.

Table 1: EU policy objectives and current situation

EU policy priorities	Objectives	Current
Equal economic independence	75% employment rate for women and men	Women: 63.5% Men: 75% ³⁴
Equal pay for equal work	Close the gender pay gap	16.4% ³⁵
Equality in decision-making	25% women in leading public research positions 40% women in non-executive board-member positions 33% women in top executive roles	19% women as full University professors 34% women in Research and Development 21.2% women as board members of largest publicly traded companies
Dignity, integrity and end of gender-based violence	End gender-based violence and eradicate genital mutilation in Europe	Between 20% and 25% of women have suffered physical violence Estimated 500,000 women in Europe suffered genital mutilation

The Strategy goes beyond equal treatment for women and men in the labour market. It addresses issues that may indirectly place women in less favourable conditions, such as family and paternal leave and availability of childcare facilities. It also aims to increase the role of women in decision-making and in science and research, as well as put an end to gender-based violence, specifically the practice of female genital mutilation, in Europe and beyond.

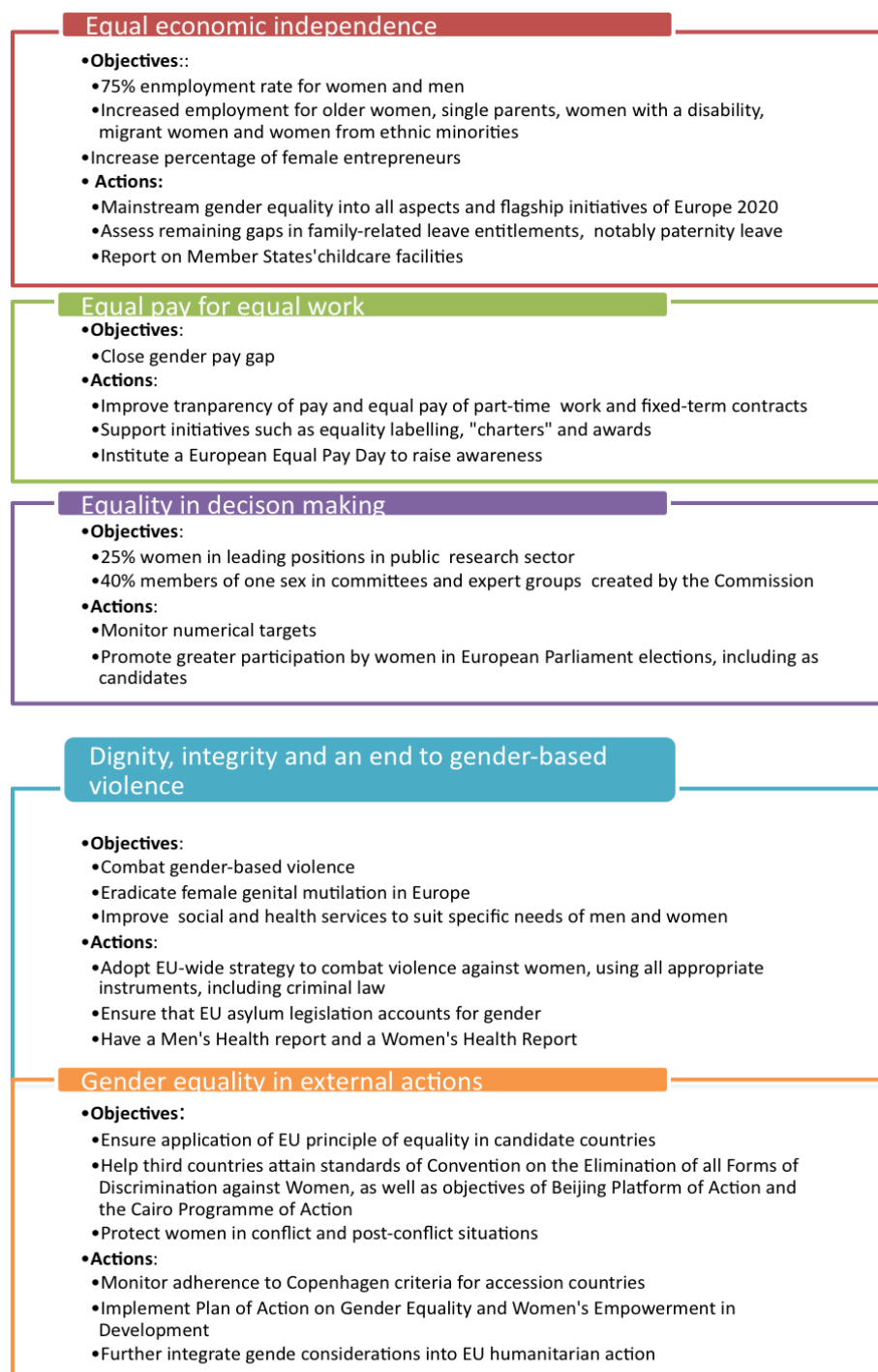
³² European Commission (2010). *Strategy for equality between women and men: 2010-2015*. Luxembourg: Publications Office of the European Union

³³ European Commission (2015). *European Commission - European Judicial Network - Glossary*. [online] Available at: http://ec.europa.eu/civiljustice/glossary/glossary_en.htm#Communication

³⁴ In 2014

³⁵ Difference between average gross hourly earnings of male paid employees and of female paid employees as a percentage of average gross hourly earnings of male paid employees, in 2012.

Fig.3. Strategy for equality between women and men 2010-2015



3 GENDER EVALUATION IN PRACTICE

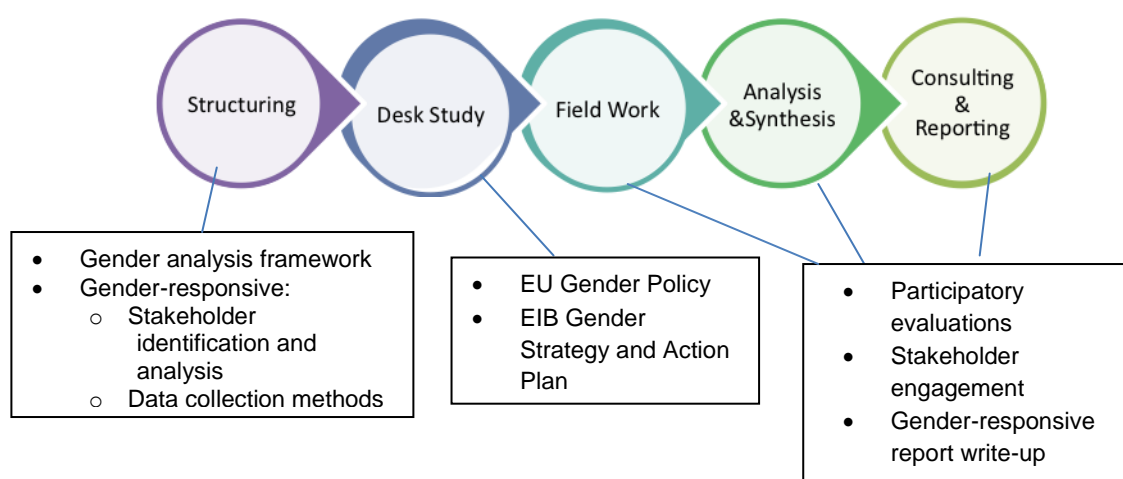
Gender-responsive evaluations are informed by gender equality consideration in what they examine and the way they examine it, i.e. their process and results. The process through which an evaluation is conducted should mainstream gender to every aspect of its approach. Evaluations should also examine whether the intervention's project cycle was managed in a way that was responsive to gender. Regarding results, evaluations must assess whether the gender objectives of an intervention and of the organization were carried out, how effectively and efficiently they were completed and what lessons may be learned for future improvement. An evaluation team will assess the degree to which gender and power relations have changed as a result of an intervention and they must conduct this examination in manner that is inclusive, participatory and respectful of stakeholders. This section presents and discusses tools and methods to pursue gender-responsive evaluations in their process and examination of results.

3.1 Process

At the EIB's Operations Evaluations Division, each evaluation is divided into roughly five stages: structuring; desk study; field work; analysis and synthesis; consulting and reporting. The structuring stage sets the scope and approach for the conduct of the evaluation, i.e., data collection methods, stakeholder identification, evaluation questions and judgement criteria and indicators. During the desk study stage, the evaluation team reviews relevant policy at the EU and EIB level, as well as past evaluations and studies, and selects the sample of projects for in-depth analysis. At the fieldwork stage, evaluators and/or external sources interview staff, the client, promoter and other relevant stakeholders, such as beneficiaries. At the analysis & synthesis stage, data and information collected are analysed according to the approach and methodology established during the evaluation structuring. Additional interviews may be conducted, and workshops are held with services in order to refine findings and recommendations. Finally, during the consultation & reporting stage, evaluators go through several rounds of consultations with relevant services of the EIB, the Management Committee and the Board.

Responsiveness to gender equality and gender relations should be present throughout the evaluation process. The figure below identifies a number of tools that can be used to ensure a gender-responsive evaluation process.

Fig.4: EIB's evaluation cycle and gender-responsive tools



The table below lists a few questions regarding that may be asked during the evaluation process in order to ensure gender issues are adequately represented.

Table 2: Questions for gender-responsive evaluations

Questions to be addressed	Planning activity/tools
Is/has the gender objective being/been met?	Desk analysis
Do programme and project evaluations report reflect gender issues, and is information disaggregated by sex?	Desk analysis
Do final reports systematically identify gender gaps and gender-related project successes?	Desk analysis
Do the terms of reference of evaluators require gender expertise and experience?	Desk analysis
Are evaluators briefed on relevant gender issues and provided with documentation?	Desk analysis and consultations
Will the evaluation consider project outcomes/results with respect to differences in needs and priorities for women and men?	Desk analysis
Does the assessment incorporate the views of participants and end users, both male and female? Who decides whether a project is successful or not? And what are the parameters for success? Do the monitoring reports capture information on gender-related changes including impact of intervention on women's workload and time use, access and control of income and resources, decision making, reproductive roles, and expressed aspirations of women and men?	Desk analysis
Will the evaluators seek the input of both women and men and analyze differences and similarities? Is there a feedback mechanism within the project that allows implementers to make course corrections? Are women as able as men to influence effectively any required corrective changes?	Desk analysis
Will the ex-post evaluation identify "lessons learned" relating to working with a gender perspective in energy?	Desk analysis

Source: UNDP, 2004³⁶

3.1.1 Gender analysis framework

A comprehensive approach to a gender-responsive evaluation process is to use a **gender analysis framework**. A gender analysis framework is a tool to include gender analysis at every stage and aspect of the project cycle. Gender analysis aims to explore and flesh out the roles and relationships between men and women in society and the inequalities in those relationships.³⁷ It asks questions such as:

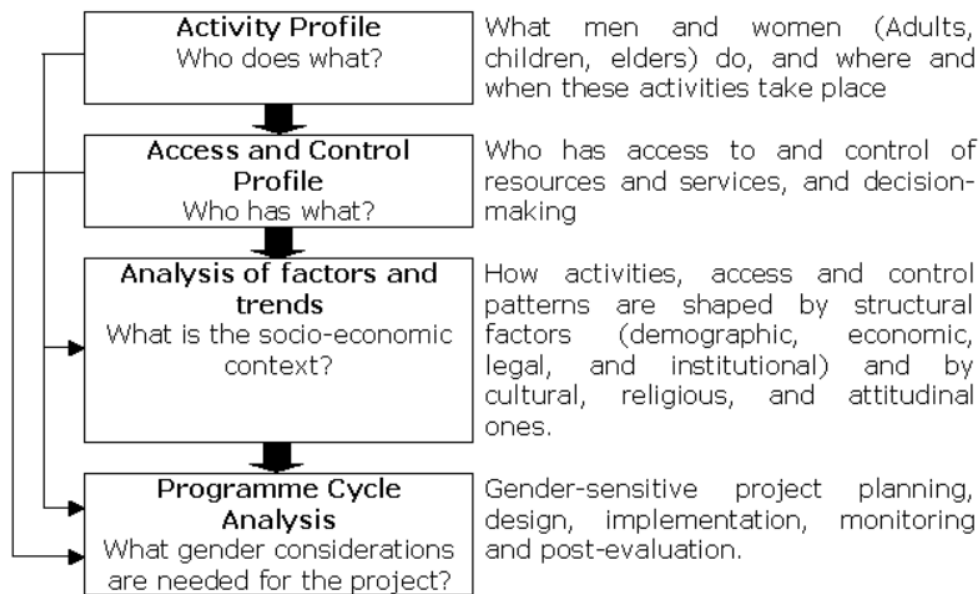
³⁶ United Nations Development Program (UNDP) (2004). *Gender and Energy for Sustainable Development: a Toolkit and Resource Guide*. New York: UNDP. P.60

³⁷ C March, C., Smyth, I., and Mukhopadhyay, M. (1999) *A Guide to Gender Analysis Frameworks*. Oxford: Oxfam, pp32-54

- Who does what?
- When, where and how often do they do it?
- Who has access to what?
- Who controls what?
- Who makes decisions?

There are several gender analysis frameworks, such as the [Harvard analytical framework](#), the [Moser gender analysis framework](#), social relations framework and [women's empowerment framework](#). The following template illustrates the key stages that a typical gender analysis framework encompasses.

Fig. 5: Gender analysis framework



Source: Global Development Research Center³⁸

When carrying out the **Activity Profile**, an evaluator should analyse which groups of people (women, men, children, elders and other relevant groups) perform which activities. Activities considered are usually not only remunerated jobs, but also informal productive, reproductive and community-service.

Questions should be directed at understanding which groups- including gendered groups- perform activities such as the production of goods and services, reproductive and human resource maintenance activities, as well as community work. It identifies how much time is spent on each activity, how often this work is done (e.g., daily or seasonally), which periods are characterized by a high demand for labor, and what extra demands the intervention may place on women, men, and children.

During the **Access and Control Profile** stage, an evaluator should analyse which groups have access to and control over relevant resources, services and decision-making power over resource allocation and use. Resources include land, machinery, labor, capital, credit, education and training. This assessment is useful for identifying whether the intervention has undermined, or could undermine, women's access to productive resources, or if it has changed the balance of power between men and women regarding control over resources. Similarly, the profile examines whether and the extent to which women and men, as well as other vulnerable subgroups, such as elderly or

³⁸ Srinivas, H. (2015). *Towards a gender analysis framework to assist the application, adoption and use of environmentally sound technologies*. Kobe, Japan: Global Development Research Centre.

poor women, have been impeded from fully benefiting from the intervention, due to factors such as limited access to income or land, inability to join formal groups or to become independent commercial producers.

While performing an **Analysis of Factors and Trends**, evaluators draw on the conclusions regarding who, when and where gendered groups perform activities and what access and control they have over resources, in order to outline the socioeconomic structure behind these allocations. Gender patterns of activity and access and control in the project area may be influenced by:

- demographic factors, including household composition and power relations;
- economic factors, such as poverty, inflation rates, income distribution, and infrastructure;
- cultural and religious factors;
- education levels and gender participation rates;
- political, institutional, and legal factors.³⁹

Questions the evaluator may ask include:

- Were women from poorer households further prevented from participating in the intervention's activities?
- Which community norms and beliefs may have influenced women's participation in the intervention's activities?
- Were there policies and programs in place aimed at ensuring women's participation in intervention's activities?
- Did women and men have the necessary education and/or training to participate fully in the activities?
- Were there laws or regulations that could affect women's participation in the intervention or their access to its benefits?⁴⁰

Finally, **Program Cycle Analysis** may be used by an evaluator to determine how gender-responsive the evaluation process is. The Harvard analytical framework recommends the following issues to be examined during ex-post evaluation:

- Does the intervention's monitoring and evaluation system explicitly measure the project's effects on women?
- Does it collect data to update the Activity Analysis and the Access and Control Analysis?
- Are women involved in designing the data requirements?
- Are women involved in the collection and interpretation of data?
- Are data analysed so as to provide guidance to the design of other projects?⁴¹

In addition to using the gender analysis framework to integrate gender considerations into the evaluation, an evaluator may also examine whether this framework was employed during upstream stages of the intervention's cycle. Did the intervention's planning, appraisal and implementation examine gender activity and access profiles? Did they consider whether structural factors might undermine the benefits of the intervention for a particular group? These are important questions regarding the gender-responsiveness of the process of any intervention or cluster of interventions being evaluated.

3.1.2 Stakeholder identification, analysis and engagement

One of the main elements of a gender-responsive evaluation is the inclusion of women and men, as well as of other vulnerable groups, in the evaluation process. A gender-sensitive stakeholder identification and analysis is one that is:

- Inclusive;

³⁹ Srinivas, H., 2015.

⁴⁰ Ibid

⁴¹ March, C., Smyth, I., and Mukhopadhyay, M., 1999.

- Disaggregated for women, men and vulnerable groups;
- Participatory and reflective;
- Engaging of stakeholders throughout evaluation process;
- Respectful of stakeholders;
- Transparent and accountable.⁴²

The following template helps an evaluator carry out **stakeholder identification and analysis**:

Table 3: Stakeholder analysis template

Who	What (their role in the intervention)	Why (gains from involvement in the evaluation)	How (informational, reference group, management group, data collection, etc.)	When (in what stage of evaluation)	Priority (importance of involvement)
Duty bearers who have direct responsibility for the intervention, such as programme managers					
Secondary duty bearers, such as the private sector or parents					
Rights holders (individually or through the civil society organizations acting on their behalf) who are the intended and unintended beneficiaries of the intervention					
Rights holders (individually or through the civil society organizations acting on their behalf) who should be represented in the intervention but are not, or who are negatively affected by the intervention					

Source: UN Women (2005)⁴³

⁴² Independent Evaluation Office. (2015). *How to Manage Gender-Responsive Evaluations*. New York: UN Women

Furthermore, gender-responsive evaluations should ensure that women and other potentially excluded groups are consulted during stakeholder identification and analysis. The evaluation team may develop a checklist to verify relevant groups' views and experiences were represented, by asking questions such as:

- Have we identified all excluded groups, women and men?
- Have excluded groups, women and men, been consulted?
- Does staff have the skills and commitment to identify excluded groups?
- What are potential barriers for some groups to be involved in stakeholder identification and analysis?

Not only does a gender-responsive evaluation process include different groups during stakeholder identification and analysis, it also **engages stakeholders** throughout the evaluation process, considering their expectations regarding the evaluation outcome and maintaining transparency in the design and conduct of the evaluation. A powerful tool for stakeholder engagement is the use of **participatory evaluations**. Participatory evaluations place stakeholders at the centre of the evaluation design. In participatory evaluations, stakeholders are involved in:

- Setting scope of evaluation;
- Contributing to approach, including the design of the results framework;
- Identifying the questions to ask about the project and the best ways to ask them
- Collecting and interpreting data;
- Making sense of that information;
- Findings and recommendations.

Participatory evaluations promote stakeholder empowerment and ownership, and may allow evaluators to obtain information that would otherwise be difficult to obtain, or to become aware of issues in the community that they were previously unaware of, namely gender dynamics. On the other hand, participatory evaluations are more time-consuming than non-participatory evaluations and may render the requirement of impartiality more difficult to ensure.

The different stakeholders involved in the evaluation have different expectations from the evaluation. The table below lists some of the common EIB stakeholders and their potential general and gender-specific expectations:

Table 4: Evaluations stakeholders' expectations

Stakeholder type	General expectations	Gender-specific expectations
EU and Member States	Interested in the impacts of the intervention, and whether they contribute to EU policy priorities.	Interested in impacts of the intervention, and whether they contribute to EU gender equality priorities, such equal economic opportunity; gender balance in decision-making, among others.
Beneficiaries	Expect an evaluation to contribute to improving effectiveness of future interventions.	Expect evaluation to contribute to future interventions delivering measurable and concrete results for women's immediate needs and more equitable gender relations.
Promoters	Expect report to be complete and fair and evaluation process to be clear and transparent.	Expect evaluation to take into account the nature and context of the project (gender cultural values, legislation, etc)

⁴³ Independent Evaluation Office. (2015). *How to Manage Gender-Responsive Evaluations*. New York: UN Women. P. 148

EIB colleagues	Interested in key lessons to improve design of future interventions	Interested in key lessons on how to mitigate potential negative impacts for gender equality and/or how to identify best practises in future interventions
Civil society & gender advocacy groups	Interested in EIB's accountability and how evaluation may contribute to the continuation of interventions that will bring about systemic change	Expect evaluation to inform how EIB's intervention(s) contribute to systemic change in gender power relations and attend to women's and other vulnerable groups' immediate and strategic needs

3.1.3 Data collection

One important aspect of a gender-responsive evaluation is the collection of sex-disaggregated data, as well as data disaggregated for groups who may be marginalized and whose marginalization may be increase according to gender. Lack of sufficient and reliable sex-disaggregated relevant data was one of the factors contributing to the inadequacy in results reporting found in several studies on gender mainstreaming across organizations, detailed in section 2 of this report.

Different data collection tools should be assessed for their effectiveness and efficiency, but also for how they may affect certain groups of beneficiaries and how inclusive they are of vulnerable populations. Issues such as selection biases (gender, power, and privacy and confidentiality issues) should be considered.

The template below is utilized by UN Women for the assessment of data collection methods:

Case Study: World Bank gender data-related investments:

- **Gender Data Portal**, which includes micro databases and resources, with the aim of creating a one-stop Web-site for all gender-relevant data at <http://datatopics.worldbank.org/gender/>
- **Gender DataFinder app**, which allows users to explore, analyze, and share gender-relevant data;
- **Little Data Book on Gender** and **Little Data Book on Gender in Africa**;
- Training workshops in Africa and Asia on a new manual produced by the United Nations Statistical Division on why and how to collect gender-relevant data;
- Support for global partnerships to improve availability of gender-relevant data, including the **Inter-Agency and Expert Group on Gender Statistics**

Table 5: Advantages and disadvantages of data collection methods

Method	Advantages	Disadvantages
Review of documentation (made available to evaluator or collected by evaluator)		
	Inexpensive <ul style="list-style-type: none"> • Relatively fast and easy 	<ul style="list-style-type: none"> • Limited to documents available • Difficult to verify quality of information • Leaves out tacit and informal knowledge
Interviews (conducted by evaluator or trained researcher)		
<ul style="list-style-type: none"> • UN Women management or staff • Stakeholders involved in or affected by the intervention 	<ul style="list-style-type: none"> • Provide context of the topic being evaluated • Suitable for complex or sensitive topics • Increased depth and detail 	<ul style="list-style-type: none"> • Time consuming (in arranging and conducting interviews) • Cannot generalize findings • Can be costly if evaluator and interviewees must be in same location (video-conferences may be possible but may limit effectiveness)

		and number and type of participants)
Focus group sessions (a group of people are asked about their perceptions, opinions, beliefs, and attitudes about the issue under study; moderated by someone external to the programme or project)		
<ul style="list-style-type: none"> • UN Women management or staff • Stakeholders involved in or affected by the intervention 	<ul style="list-style-type: none"> • Faster and more cost-effective than individual interviews • Group interaction may bring out nuances 	<ul style="list-style-type: none"> • Inability to give views anonymously • Responses cannot easily be compared or generalized
Survey (written questionnaire, web-based questionnaire, or telephone survey, etc.)		
<ul style="list-style-type: none"> • UN Women management or staff • Stakeholders that are close to the programme implementation 	<ul style="list-style-type: none"> • Relatively inexpensive • Ability to reach more stakeholders • Summarizes findings in a clear and precise way • Depending on the size of the sample, suitable for comparison of findings 	<ul style="list-style-type: none"> • Risk of losing subtle differences in responses • Usefulness depends on response rate • Difficult to verify quality of information
Observation (key meetings, processes or events)		
<ul style="list-style-type: none"> • By evaluator or trained researchers 	<ul style="list-style-type: none"> • Ability to observe first-hand the programme or initiative “in action” 	<ul style="list-style-type: none"> • Depending on the location: could be expensive and time-consuming (in arranging and conducting them) • Cannot easily be compared or generalized • Bias may be introduced if the participants are aware of the evaluators presence

Source: UN Women (2015)⁴⁴

Gender-responsive evaluations should employ both quantitative and qualitative data. Qualitative data provides context to inform the collection, treatment and interpretation of quantitative data. It identifies gaps in knowledge to be filled by surveys, suggests means of construction of indicators that complement or replace existing indicators and helps determine ‘appropriate stratification’ of the quantitative survey and subsequent disaggregation of survey analysis, along gender lines.⁴⁵ Besides interviews and focus groups, there is a breadth of qualitative data collection methods that may be used by an evaluator, namely field experiences of members of the evaluation team, with an emphasis on informal interactions with beneficiaries, instead of only formal meetings with governmental and project officials.⁴⁶

Using the terminology from Hentschel’s (1999)⁴⁷ method-data framework, non-contextual methods—applied often to a country or region—are designed to achieve breadth in coverage and analysis. Typically, such methods produce quantitative data. Contextual methods, on the other hand, are applied to a specific region, case or social setting and are designed to explore issues in depth. Contextual research utilizes techniques as participant observation, interviews and participatory tools that are often group-based and visual. Typically, such methods produce qualitative data. The Figure below illustrates the dichotomy between non-contextual and contextual data collection methods.

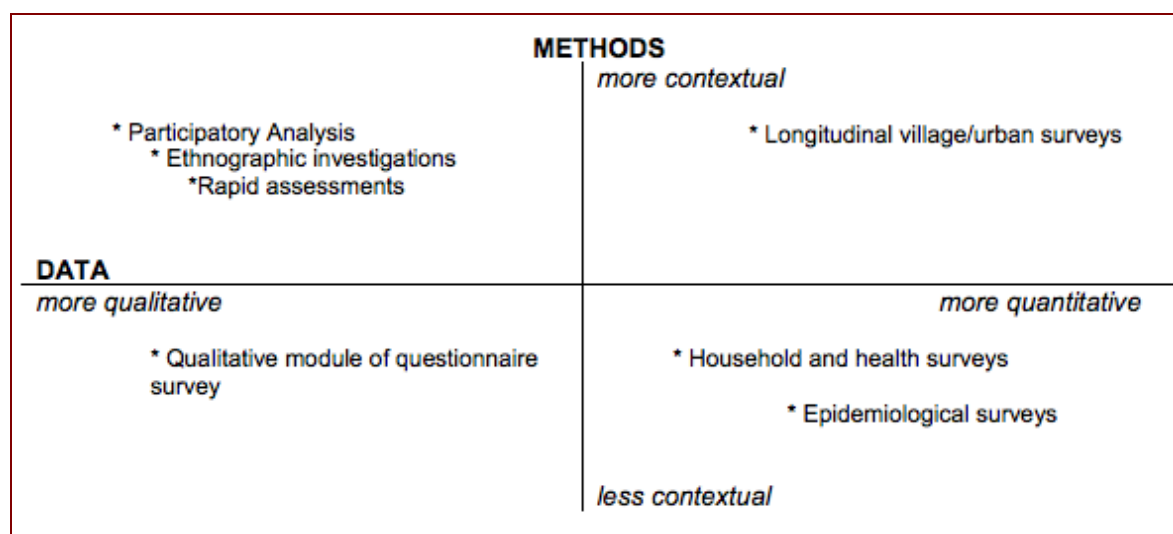
⁴⁴ Independent Evaluation Office. (2015). *How to Manage Gender-Responsive Evaluations*. New York: UN Women. P.155

⁴⁵ Garbarino, S. and Holland (2009). *Quantitative and Qualitative in Impact Evaluation and Measuring Results*. GSDRC Emerging Issues Research Service.

⁴⁶ OECD (2001). *Evaluation Feedback for Effective Learning and Accountability*. Paris: OECD.

⁴⁷ Hentschel’s (1999). *Contextuality and data collection methods: A Framework and application to health service utilization*. Journal of Development Studies 35. Pp: 64-94.

Fig.6: Method data framework



Source: Garbarino, S. and Holland, 2009⁴⁸

Participatory data collection methods are important features of gender-responsive evaluations. Like qualitative data collection methods, they employ mostly contextual data collection. In fact, participatory evaluation methods tend to collect qualitative data more frequently than quantitative data, although they can produce both. Participatory approaches contain a variety of data collection methods, namely “(a) participatory listening and observation; (b) visual tools such as maps, daily activity diagrams, institutional diagrams and Venn diagrams, flow diagrams and livelihood analysis; (c) semistructured interviews; and (d) focus group discussions.”⁴⁹ Semi-structured interviews and focus groups are the most often used instruments for gathering the views of participants.

3.1.4 Evaluation report

The evaluation report, as the main product of an evaluation, is the key element of a **results-based management approach** to gender mainstreaming and gender interventions. The evaluation report must, therefore, be a credible source of evidence and for future decision-making regarding project design, implementation and monitoring by providing information regarding stakeholders’ needs, the project’s process and results.

“Good use of evaluation results is more than action by the manager to respond to recommendations. It is about engaging with stakeholders to implement change.”

-UN Women 2015

A gender-responsive evaluation report should:

- Indicate how evaluation carried out a gender-responsive methodology;
- Discuss the extent to which evaluation design included ethical safeguards (namely in data collection and stakeholder identification and analysis) by protecting privacy and respecting the rights, values and dignity of stakeholders;
- Discuss how stakeholders may have been empowered in the evaluation process;
- Utilize gender analysis throughout the report;
- Provide recommendations for the improvement of gender equality performance;

⁴⁸ Garbarino, S. and Holland. 2009.

⁴⁹ Venne, R. (2005). *Framework for Monitoring, Review and Appraisal of the Madrid International Plan of Action on Ageing*. Madrid: UN DESA.

- Highlight gender-mainstreaming lessons that apply beyond the scope of the particular project or program being evaluated.⁵⁰

As mentioned in the previous sections, an important feature of a gender-responsive evaluation is the engagement of stakeholders throughout the evaluation process. The evaluation report should indicate who were the stakeholders identified for criteria selection, their level of participation throughout the evaluation process, as well as transparency considerations, namely significant divergent views that stakeholders may have held regarding final evaluation product and the rationale for the divergence. Although stakeholders' views should be taken into account, they should never interfere with the impartiality of the evaluation. During the report write-up stage, stakeholders should remain involved, providing commentary on the draft report; the needs and expectations from those having a stake in the evaluation product should be taken into account. Fig.3 of section 3.1.2 lists potential expectations of stakeholders regarding gender equality aspects of an EIB evaluation.

3.2 Results

3.2.1 Broad issues for gender results

Gender results are results that directly impact women and men, contribute to changing gender relations, as well as norms regarding gender roles.⁵¹

One of the main obstacles gender mainstreaming has encountered since it has been adopted as a global strategy since in 1995 has been weaknesses in results reporting. As was discussed in section 2 of this report, misreporting or underreporting of gender results is an enduring obstacle to effective accountability and learning in gender mainstreaming. Some of the obstacles indicated by several studies that reviewed numerous evaluations have been unclear gender objectives and weak results frameworks, imprecise indicators coupled with lack of sex-disaggregated data, as well as insufficient attention paid to unintended results (results which were not clearly stated as ex-ante objectives) and to women's strategic interests. Considering that strong results reporting is one of the main drivers for an effective use of gender mainstreaming, it is important to clarify what gender equality results are, and tools and methods to capture them for accountability and learning for the future.

UN Women defines gender evaluations as *"a systematic and impartial assessment that provides credible and reliable evidence-based information about the extent to which an intervention has resulted in progress (or lack thereof) towards intended and/or unintended results regarding gender equality and the empowerment of women."*⁵²

There are two inferences to make from the UN Women's definition of gender evaluations: first, gender equality results may have been intended, and therefore have featured in the project or program objectives, but they may also be unintended consequences, i.e. results that were not explicitly set as ex-ante objectives. The second inference is the dynamic nature of gender equality results. These are defined as progress towards gender equality and women's empowerment. Gender results should not be seen merely as direct outcomes for women and men, but rather as contributing to changing the underlying roots of gender inequality.

This notion is linked to the concepts of **practical gender needs** and **strategic gender interests**. *"Strategic gender needs"*, a term first coined in 1985 by Maxine Molyneux, refers to long-term, usually not material, results that bring about structural change to eliminate the underlying causes of gender inequality. In contrast, practical gender needs are immediate and material needs of women and men that fit with traditional gender roles and relations. Examples are the need for food, shelter or work.⁵³ Results fulfilling practical gender needs would be, for example, the provision of income-generating activities for women, whereas results fulfilling strategic interests would change women's access to, and position in, the labor market. Responding to practical needs may improve the quality of

⁵⁰ Independent Evaluation Office. (2015). *How to Manage Gender-Responsive Evaluations*. New York: UN Women.

⁵¹ Juliet Hun (2013). *Tool kit on gender equality results and indicators*. Mandaluyong City: Asian Development Bank.

⁵² Independent Evaluation Office (2015). *How to Manage Gender-Responsive Evaluations*. New York: UN Women. P. 5

⁵³ UNESCO (2003). Baseline definitions of key concepts. In *UNESCO'S Gender Mainstreaming Implementation Framework (GMIF) for 2002-2007*. Paris: UNESCO

life of women and men but does not necessarily contribute to eliminating inequality. Nevertheless, results that address practical gender needs may lead to structural change in the long term. The table below provides a few examples of practical gender needs vis-à-vis strategic interests.

Table 6: Practical gender needs and strategic gender needs

	Practical Gender Need	Results	Strategic Gender Interest	Results
Women can't own property	• Income	• More income-generating opportunities for women	• Control over assets, resources, life options	• Change law • Change traditional inheritance practices • Change societal attitudes and norms
Men's participation in reproductive health issues is low	• Access to information and services	• Extend information and services to men	• Control over personal health decision-making	• Change social norms to engage more men
Women are not allowed to visit the health clinic alone	• Access to information and care	• Mobile units come to households	• Control over mobility and personal health decision-making	• Change attitudes toward women's mobility and control over health

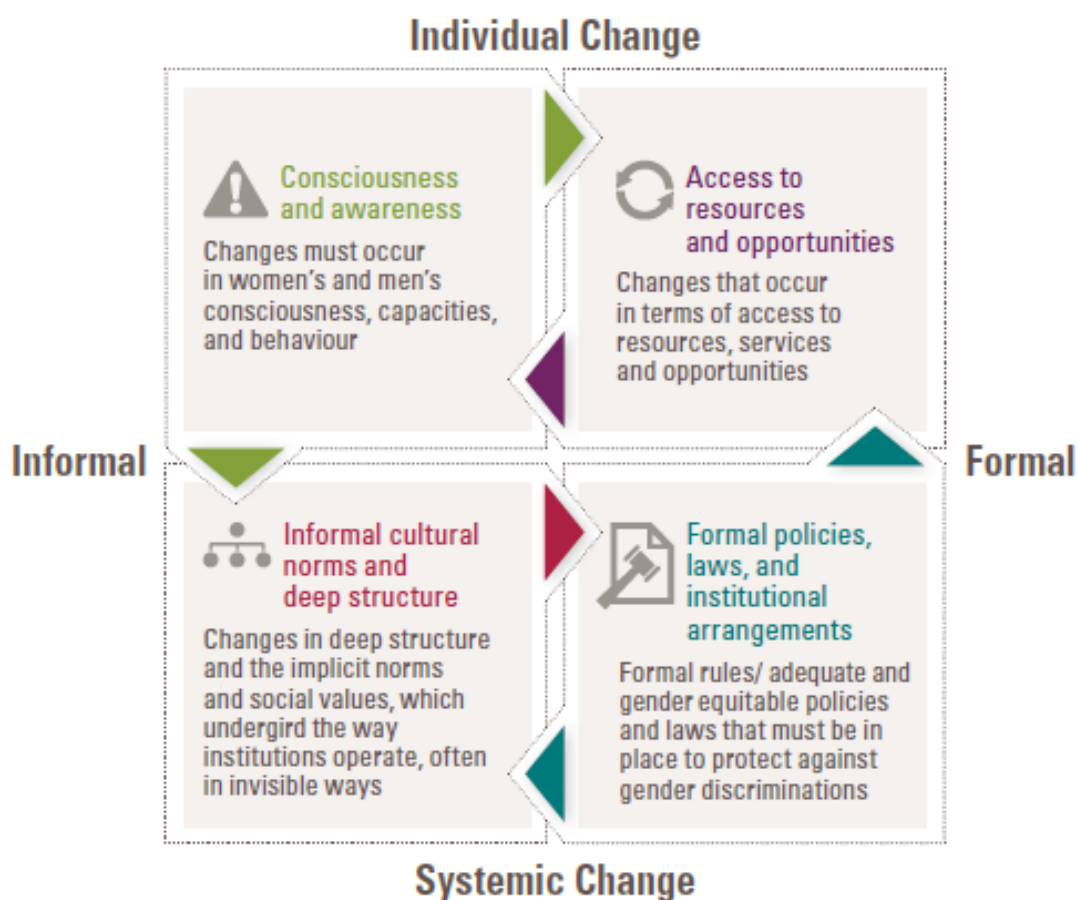
Source: CEDPA⁵⁴

When evaluating outcomes for gender equality, an evaluator may want to be aware of whether results were targeted at practical needs or strategic interests. Including an analysis of whether results were geared towards practical gender needs or strategic gender interests in the evaluation would contribute to improving the quality of the evaluation. In section 2.2., it was mentioned that one of the weaknesses found across evaluation reports was the lack of reference to women's strategic interests.

The Independent Evaluation Office has elaborated another framework for identifying the type and areas of work to which an intervention has contributed. The Gender@Work framework enables a deeper analysis of the types of changes that occur when trying to achieve gender awareness and transformation. The UNDP Evaluation team works under the presence that effective programming requires four types of change, which are depicted in the figure below: individual change, formal change, systemic change and informal change.

⁵⁴ The Centre for Development and Population Activities (CEDPA). (2000). Practical Gender Needs and Strategic Gender Interests. In *Social Mobilization for Reproductive Health*. Washington, DC: CEDPA

Fig.7: Gender@Work quadrants of change

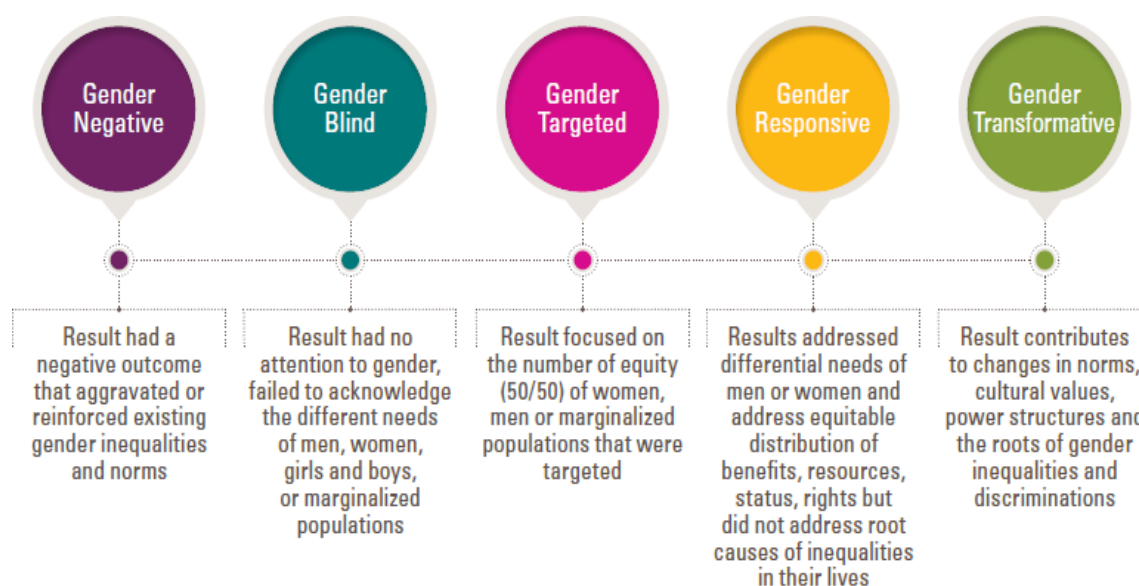


Source: UNDP (2015)⁵⁵

When evaluating the effectiveness of an intervention's gender equality results, the Evaluation unit of the United Nations Development Program has designed an analytical framework- the "Gender Results Effectiveness Scale"- to identify the type and quality of an intervention's gender results at an aggregate level. The two UNDP analytical frameworks- Gender@Work Quadrants of Change and the Gender Results Effectiveness Scale- can be used together, as the Evaluation office of UNDP considers that in order for the intervention to be considered gender transformative, a similar number of and concentration of changes must be present in each quadrant of change.

⁵⁵ Independent Evaluation Office (2015). *Evaluation of UNDP Contribution to Gender Equality and Women's Empowerment*. New York: UNDP. P.46.

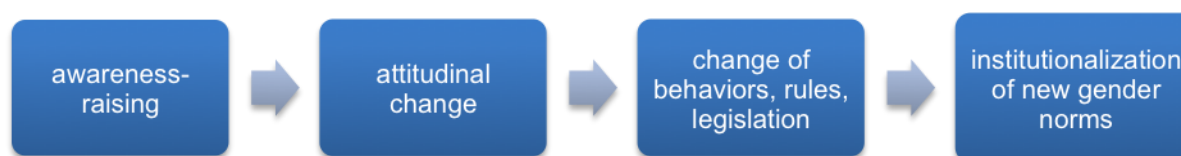
Fig.8: Gender Results Effectiveness Scale (GRES)



Source: UNDP (2015)^{bb}

An example of a gender-targeted result would be ensuring an even number of women and men, or members of a marginalized or vulnerable group, to benefit from the intervention, for instance through a quota system. Examples of gender-responsive results include increased women's participation in commissions and political parties, or increased economic opportunities for women as a result of skills building, education and training, or networking activities. Gender-transformative outcomes generally emerge from a process of change through several stages, moving from awareness-raising, to attitudinal change, to change in behaviour and rules, often accompanied by the institutionalization of new norms.

Fig. 9: Gender transformative result



It is also important to distinguish between **outputs, outcomes and impacts** when evaluating gender results. Outputs refer to changes in skills or abilities, as well as the provision of goods or services resulting from a project's activities. An output of a credit line project could be, for example, new business skills in unemployed women as a result of business training, as well as access to capital from the credit line. Outcomes represent change in institutional and behavioural capacities. A credit line project or program could produce the outcome of an increase in women entrepreneurs, as well as, for example, reduction of low-income households headed by women. Impacts include changes in conditions for women and girls, as well as men and boys. These changes can be economic, socio-cultural, institutional, attitudinal and legal. Impacts can be positive or negative, direct or indirect, and intended and unintended.

⁵⁶ *Ibid.* P.46

3.2.2 Evaluation questions, criteria and indicators

Gender-responsive indicators should broadly measure:

- Differences in access, participation, outcomes, and impacts for women, men, boys, and girls;
- Changes in gender relations (positive or negative)
- How these changes impact on the achievement of organization's objectives, such as equal economic opportunities, inclusive growth and balance in decision-making power.

The Figure below helps to identify some relevant issues for gender-sensitive indicators.

Fig.10: Checklist for using gender equality indicators

Box 3: A Checklist for Using Gender Equality Indicators

- Do stakeholders understand why it is important to collect sex-disaggregated information, and to undertake social and gender analysis?
- Does the capacity of partners and implementers to collect and analyze sex-disaggregated information need to be strengthened?
- Who is the information for? Do key stakeholders understand how it will be used, and is it relevant to their needs?
- Are the indicators easy to understand and use? Can the information be easily collected using existing local systems?
- Do the indicators impose new reporting burdens on partners, or are they aligned with existing reporting obligations?
- Will the information to be collected tell us whether development objectives have been achieved for both women and men, and whether there are any significant differences in the benefits for women and men, boys, and girls?
- Will the indicators help to measure gender equality results—such as women's and men's participation, benefits, outcomes, and impacts?
- Will the indicators help to measure changes and trends in gender relations over time, and the causes of those changes and trends?
- Will both quantitative and qualitative methods be used to collect information?
- Has gender and social analysis been used to help identify the indicators?
- Will the indicators provide information to improve the effectiveness of strategies to address gender inequalities and advance gender equality?

Source: J. Hunt. 2011. Introduction to Gender Sensitive Monitoring and Evaluation. Unpublished training notes.

Whenever possible, indicators should be designed with a participatory approach, engaging with key stakeholders.

One of the main challenges in gender-responsive indicators is how to move beyond sex-disaggregated indicators. Elaborating indicators with no regard for gender issues and then simply separating those indicators by gender may only go so far in measuring progress toward gender equality. Although collecting sex-disaggregated data is the baseline for gender-sensitive evaluations, evaluation questions and indicators should do more than just disaggregate by gender and must instead provide analysis of gender issues. This is achieved by having good background information regarding the gender issues of each sector and country/region and engaging in gender analysis. For example, as section 3.3 discusses, an energy project that only provides electrification without provision or improved access to modern fuels and appliances may actually increase the hardship for women, due to the prolongation of a working day. Therefore, an indicator measuring access to modern appliances such as cookstoves has an inherent gender dimension without needing to collect sex-disaggregated data.

Evaluation questions:

- Was commitment to gender inclusion manifested throughout the project?
- Did the project team as a whole collect gender disaggregated data?

- Was a reporting system established to monitor progress with the Gender Action Plan (GAP) as an integrated part of project management?
- Were the specific objectives of the GAP achieved?
- Are men and women satisfied with the interventions in terms of process and content? If not, why?
- How did the initiative fit into the wider picture in terms of government programmes and policy frameworks? What entry points for follow-up and complementary activities emerge from the gender mainstreaming process?
- Does the gender mainstreaming process include concrete recommendation for follow-up activities?
- Does the process have implications that are relevant for other organisations within the public, private and NGO sectors?
- Are the results and processes of the GAP and gender mainstreaming process being documented in a way that will become part of the institutional memory of the stakeholders become part of the institutional memory of the stakeholders involved? Will the results be sustainable?

3.3 Sector-specific evaluations

3.3.1 Mobility

Real projects examples

- **Road construction** in Bamako (Mali) improved enrolment rate of girls thanks to easier access to the related facilities (AfDB)
- **Transport corridor** project in Zambia, provided gender-sensitization training to communities impacted by the civil works; women made up 20% of unskilled labor during construction and 10% during implementation (AfDB)

When evaluating a mobility scheme, evaluators should consider some issues specific to gender equality that may not have been explicit during project planning and implementation, namely:

- Women are the majority of users of public transportation, as many women do not have access to private cars;
- Women's reliance on public transportation poses specific constraints such as time constraints, less flexible schedules and routes;
- Women and men may have different priorities and concerns regarding safety features of public transportation and roads, regarding street lighting, accessibility, pedestrian crossings, speed limits and the design of means of transport.
- Differences in employment between women and men in mobility sector, particularly in technical and managerial positions.

The Figure below is the template used by the European Bank of Reconstruction and Development to assess gender issues regarding transportation and public roads. The template is a checklist for entry-points, meant to be used at the planning and design stages. It is, however, useful to highlight key issues pertaining to gender and mobility and may be employed by evaluators.

Table 7: Summary of gender issues for urban roads and public transport.

Issue	Evidence	Priorities and Needs	Possible mitigation measures at the design stage
Safety	It is conventional good practice to carry out a Safety Audit at the design stage. In the “Safer Cities Project” UN Habitat encouraged the additional use of “Women’s Safety Audits” to focus the attention on women’s priorities		
Street lighting	Women feel threatened when there is scarce visibility. For example, additional lighting introduced in the London Borough of Hammersmith significantly reduced women’s perceptions of danger.	<p>Increasing safety at major intersections</p> <p>Increasing personal safety at night.</p> <p>Increasing efficiency of lighting.</p>	<p>Consideration of driver visibility and optimal location of street lights.</p> <p>Provide strong lighting in key spots: mostly enclosed spaces with limited exits (such as underground passageways) and deserted places (residential areas, parking lots). However it is often the responsibility of the energy company rather than the transport company to provide a certain standard of service</p> <p>Replacing old light fixtures, cost benefit consideration of alternative sources</p>
Speed control	While this is an issue that relates to both men and women, women express higher concerns of this type	Fear of accidents (pedestrians and cyclists).	Traffic calming measures such as speed humps, changed highway geometry, speed limits.
Road and pavement layout	Women have less access to cars and use roads less frequently– their main concerns are as pedestrians. A higher percentage of female crash fatalities occur in areas with high pedestrian activity.	<p>Fear of accidents, need for comfort</p> <p>Increasing Safety</p>	<p>Protection to pedestrians: guard fence, staggered crossing route. “Drop kerbs” for pedestrian, pram and disabled road crossing.</p> <p>Adequate number, frequency of location and width of lay-bys. Possibility of pedestrian areas in high-density spots.</p> <p>Wide pavements and regulated parking to avoid pedestrian use of roads.</p> <p>Designing roads with “eyes on the street”, facilitating natural surveillance by neighbours and shopkeepers</p>
Traffic lights and pedestrian crossing	Women with children feel they need a longer time to cross roads. When compared with men, women in urban areas tend to take more and shorter trips, often on foot (GTZ, 2007).	Fear of Accidents	Careful consideration of the location of traffic lights and pedestrian crossings – near schools, clinics, hospitals. Timing of phases (longer times for pedestrians – for example, mothers with children). Clear, understandable road markings.
Width, location and alignment of cycle lanes	When cycling, women have different safety perceptions to men, with preferences for clear, wide, well-kept cycle paths distant from cars	Fear of Accidents	<p>Lanes not necessarily adjacent to carriageway (small kerbs can increase the perception of safety).</p> <p>Lanes wide enough (women sometimes cycle with children). Special attention for arrangement of cycle lanes at junctions</p>

Public transport	Gender Audit Checklists have been adopted by many international organisations to assess gender specific needs in the provision of public transport		
Bus services, routes and frequencies	Women use public transport more than men do and at different times (off-peak). They are more likely to trip chain (having multiple purposes and multiple destinations within one “trip”) and therefore tend to value flexibility over time savings in their travel choices. Women with children often have problems accessing buses, while they also fear harassment on over-crowded transport.	Improved access, higher frequency, more flexibility, no security threat	Location of bus stops in key focal points. Higher frequency of buses to guarantee less crowded transport. Focus on off-peak transport. Use of median bus lanes (for example, Seoul decongestion). Possibility of female-only areas on transport (for example, the Tokyo metro system). Buses tailored for women/mothers: lower steps, wider doors, space for prams. Higher flexibility (for example, flexible drop-off). Integration of bus services and posting of bus schedules at bus stations/stops. Adequate waiting areas (covered shelters) and links to public transport (safe, well-lit routes from residential areas).
Fare structures	Given the smaller radius of female travel needs and often non-business related purpose, women have a higher aversion to spending money on public transport	Lower cost	Possibility of differential fare structures (time of day, routing, concessionary fares). Increasing flexibility (same ticket for multiple journeys).
Comfort	Comfort of urban travel is also a priority for women, encompassing many of the issues listed above (wide pavements, access ramps, frequent and un-crowded bus services, pedestrian areas, etc.). The frequent availability of public toilets has also been highlighted by the literature as a key issue to keep in mind.		

Source: EBRD, 2011⁵⁷

The template below lists evaluation questions and judgement criteria adapted from questions suggested by EBRD’s Guidance note for urban rehabilitation and transport projects.

Table 8: Evaluation questions and judgement criteria for mobility schemes.

Evaluation question	Judgement criteria
Have jobs become more accessible to women and men due to the development of accessible transport?	Access to jobs by women and men resulting from development of accessible transport?
Has the mobility and access to transportation of non-drivers, of which the majority are women, changed as a result of the intervention?	Mobility and access to transportation of non-drivers.
Did the project include measures to mitigate any adverse implications on pedestrian and cycling conditions?	Mitigation of potential adverse implications on pedestrians and cycling conditions.

⁵⁷ European Bank for Reconstruction and Development (EBRD) (2011). *Urban rehabilitation and transport projects*. Guidance Note. London: EBRD.

What was the percentage of women employed in the urban and transport planning?	Employment of women during urban and transport planning.
Were measures put in place to increase the number of women in leadership positions in urban and transport planning (within municipality, company)?	Women in leadership positions in urban and transport planning.
Was there an ongoing engagement with gender stakeholders (users and affected people) throughout the different phases of the project?	Engagement with gender stakeholders
Are men and women satisfied with the interventions in terms of process and content? If not, how many complaints and grievances were received from whom, and about what?	Stakeholders' satisfaction with process and content of intervention

Source: Adapted from EBRD, 2013.⁵⁸

3.3.2 Credit lines

Real projects examples
<ul style="list-style-type: none"> • Project to enhance microfinance access and usage amongst women and youth in Middle East and North Africa (MENA) by: developing a network of financial literacy trainers; developing financial literacy tool kits and producing demand-side knowledge to improve the ability of financial service providers to serve women and youth (WBG). • USD 10 million syndicated loan to Multibanco, in Peru, to benefit female micro entrepreneurs through access to finance and business training (IADB). • Energy-linked micro-enterprise portfolios were developed through microcredit banks and institutions in Asia-Pacific countries. The ENSIGN Revolving Fund provided 36 per cent of total loan funds, national financing institutions provided 50 per cent, and borrowers' equity provided 14 per cent, to finance a variety of activities, including garment making, baking, utensils manufacturing, beauty salons and rice processing. An unintended outcome was that the vast majority of borrowers were women. Significant benefits for women, in addition to income impacts, were timesavings and enhanced self-confidence from improved ability to support household income and greater control over self-generated finances (UNDP).

When evaluating a credit lines scheme, evaluators should consider some issues specific to gender equality that may or may not have been explicit during project planning and implementation, namely:

- Women may face constraints in access to credit most rural, due to poverty levels, legal or cultural restrictions to meet collateral requirements, as well as knowledge, social and cultural barriers to borrowing and owning business;
- Women may not retain control over business after borrowing;
- Poor women may face additional constraints in access to credit;
- Gender differences in composition of boards that credit lines finance

Gender-sensitive **indicators** for credit schemes may measure:

- Increased capacity of women to understand and use financial, banking, and business services effectively

⁵⁸ European Bank for Reconstruction and Development (EBRD) (2011). *Urban rehabilitation and transport projects*. Guidance Note. London: EBRD

- “Number and percentage of women and men trained in financial and banking services, taxation, and business laws and regulations”⁵⁹
- “Number of finance service providers that conduct financial literacy training in conjunction with service delivery (e.g., on protection from predatory providers, rights and obligations of borrowers, interest rates, different types of financial services)”⁶⁰
- “Number of organizations supported to improve the quality and appropriateness of financial products to benefit women”⁶¹
- Increased access to entrepreneurship by women
 - “Percentage change in the number of registered businesses owned solely or jointly by women (by number of employees and sector)”⁶²
- Increased women’s access to financial services
 - “Number and percentage of women and men who receive credit, by proportion of credit”⁶³
 - “Number and percentage of additional poor women and men with access to a range of financial services (e.g., savings, loans, insurance, transfers, remittances, bank accounts accessible by mobile phones)”⁶⁴
 - “Examples of financial services and products specifically designed to meet the needs of poor women (e.g., women’s desks, group guarantees, micro-insurance services)”⁶⁵

3.3.3 Energy

Real projects examples

- **Construction of hydro power plants** in Burundi to increase supply of clean electricity, including in rural communities. The project is expected to have positive impacts on life quality of women and girls, due to time savings in fuel provision (EIB).
- Project in Bangladesh to **improve the lighting and indoor air quality of rural households by replacing the traditional lamps with modern fluorescent lamps**. The fluorescent lamps are produced and marketed by a women’s micro-enterprise (WBG).

When evaluating an energy scheme, evaluators should consider some issues specific to gender equality that may or may not have been explicit during project planning and implementation, namely:

- Women and girls are main providers of household energy in many regions;
- Access to modern energy services and modern cooking fuels and appliances impacts on women and girls’ economic opportunities;
- Tariff levels disproportionately affect poor women-headed households;
- Women and girls suffer from health issues from collecting and using traditional energy sources;
- Availability of lighting in the household increases women’s literacy and educational levels;
- Provision of electricity without provision of modern cooking fuels or appliances may increase hardships for women;
- Evaluators should examine whether project delivered not only on economic and health outcomes, but also on women’s self-realization and control over resources;
- In employment, women are underrepresented in engineering, management and technical positions in the energy sector.

⁵⁹ Asian Development Bank (ADB) (2013). *Tool kit on gender equality results and indicators*. Mandaluyong City: ADB. P. 36

⁶⁰ *Ibid*

⁶¹ *Ibid*

⁶² *Ibid*

⁶³ *Ibid*

⁶⁴ *Ibid*

⁶⁵ *Ibid*

Approximately 1.3 billion worldwide do not currently have access to electricity and nearly 2.7 billion people rely on the traditional use of biomass for cooking, particularly in developing Asia.⁶⁶ In many contexts, it is women who suffer the most from extreme poverty, namely the lack of access to electricity. Because of their traditional responsibilities for collecting fuel and water, in many developing countries women and girls share most of the burden of collecting traditional sources of energy such as wood, charcoal, and agricultural residues for cooking and heating.⁶⁷

The lack of access to electricity means that women and girls in the developing world may spend 2 to 20 more hours a week collecting traditional energy sources and performing tasks such as producing and processing food without mechanical equipment and to cooking without energy-efficient appliances, which often prevents them from engaging in education or in income-generating activities. Additionally, many women and girls incur health problems from collecting and using unclean fuels. Evaluators must examine the energy activity profile for men and women, in order to uncover the real outcomes of an energy scheme. For example, the United Nations Development Program alerts for the fact that often *“the provision of electricity without attention to the provision of modern cooking fuels or appliances has resulted in rural electrification that in fact increases the hardships of women because the working day is prolonged while traditional fuel use patterns remain in place”*⁶⁸

The Figure below illustrates some of the practical, productive and strategic needs that women may face regarding the energy sector.

Fig.11: Energy meets women’s practical, productive and strategic needs

Energy Form	Women’s Needs and Issues		
	Practical Needs	Productive Needs	Strategic Issues
Electricity	<ul style="list-style-type: none"> ■ pumping water supplies – reducing need to haul and carry ■ mills for grinding ■ lighting improves working conditions at home 	<ul style="list-style-type: none"> ■ increase possibility of activities during evening hours ■ provide refrigeration for food production and sale ■ power for specialised enterprises such as hairdressing and Internet cafes 	<ul style="list-style-type: none"> ■ make streets safer allowing participation in other activities (e.g., evening classes and women’s group meetings) ■ opening horizons through radio, TV, and Internet
Improved biomass (supply and conversion technology)	<ul style="list-style-type: none"> ■ improved health through better stoves ■ less time and effort in gathering and carrying firewood 	<ul style="list-style-type: none"> ■ more time for productive activities ■ lower cost for process heat for income-generating activities 	<ul style="list-style-type: none"> ■ control of natural forests in community forestry management frameworks
Mechanical	<ul style="list-style-type: none"> ■ milling and grinding ■ transport and portering of water and crops 	<ul style="list-style-type: none"> ■ increases variety of enterprises 	<ul style="list-style-type: none"> ■ transport allowing access to commercial and social/political opportunities

Source: UNDP, 2004⁶⁹

Gender-sensitive **indicators** for energy schemes may measure:

- Improved access by women and men to time-saving, non-polluting and affordable technologies⁷⁰

⁶⁶ World Energy Outlook (2014). *Electricity Access Database*. International Energy Agency.

⁶⁷ United Nations Development Program (UNDP) (2004). *Gender and Energy for Sustainable Development: a Toolkit and Resource Guide*. New York: UNDP.

⁶⁸ UNDP, 2004. P. 10.

⁶⁹ UNDP, 2004.

- Number of poor households with improved access
 - Percentage of poor households headed by women
 - Number of poor households subsidized for connection
 - Number of households provided with cookstoves and other work-saving technologies
- Women and men’s satisfaction with energy services
- Reduction in time and labor requirements for women’s household chores
- Increased income generation for women and men;
 - Impact of energy scheme on women’s enterprises
 - Expanded food production for household consumption and sale
 - “Increased number of market visits by women”⁷¹
 - “Increased numbers of bus stops to serve higher volume of passengers traveling to weekly markets”⁷²
 - Number of women and men employed in energy sector, by position and pay-rate
- Increased education level attained by girls;
 - “Fewer delays in arriving at school due to relief from early morning duties such as pounding grains and drawing water.”⁷³
 - “More regular attendance because mothers kept them home less to help with domestic chores.”⁷⁴

4 PERSPECTIVES

Gender mainstreaming has come a long way as a concept since its international adoption in 1995. It has been widely adopted by multilateral institutions, international financial institutions, donor organizations and governments, typically through gender strategies and action plans. Gender mainstreaming in organizations is usually coupled with specific projects or areas that have gender equality and women’s empowerment as the main focus.

At the European Investment Bank, gender mainstreaming is on the way. To date, gender equality and women’s empowerment are not explicit policy targets in the Bank’s Corporate Operational Plan 2014-2016, nor are they an integral part of its lending. Currently, only the Impact Financing Envelope (IFE) scheme features gender as a key objective. However, a gender mainstreaming exercise has been underway at the EIB since 2014, aiming to develop a strategic approach to gender both in terms of safeguards and in impact of lending. The strategic objective will be operationalized by a Gender Action Plan, which has the following objectives⁷⁵:

- *“Promote an understanding of how unequal gender relations impede progress toward sustainable and equitable development for all, in order to place gender equality on EIB’s policy agenda;*
- *Shift focus from perceiving women and girls as a vulnerable and homogenous group or identifying women with gender work, towards informing the EIB’s safeguards and lending impact to enable equal opportunities and access to rights, resources and assets for women and men and girls and boys;*
- *Integrate gender analysis into adverse impact mitigation and safeguards;*
- *Develop tailored sectoral and regional awareness of gender issues and a set up of due diligence practices, action plans and/or products;*
- *Inform services’ ongoing thinking on a) gender disaggregated data feeding into the Bank’s results measurement framework, and b) a gender-sensitive impact monitoring in a way which enables ongoing feedback into subsequent policy and operational decisions;*

⁷⁰ Asian Development Bank (ADB) (2013). *Tool kit on gender equality results and indicators*. Mandaluyong City: ADB.

⁷¹ UNDP, 2004. P. 66

⁷² *Ibid*

⁷³ *Ibid*

⁷⁴ *Ibid*

⁷⁵ EIB. ECSO (2014). *Terms of Reference: Support to PJ/ECSO – Mainstreaming Gender in EIB Operations*. Luxembourg.

- *Build in-house appreciation of the significance of impacting on gender equality through lending, further exploring the potential of building linkages between gender and other crosscutting corporate objectives.*⁷⁶

With the gender mainstreaming exercise underway, the tools and methods presented and discussed in this report may be employed by the Operations Evaluations Division when evaluating projects mainstreamed for gender.

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⁷⁶ *Ibid.* P.4

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