GENDER AND ENERGY TOOLKIT

Support for Norad’s Energy Department
Under Frame Agreement
“Gender mainstreaming in energy projects
(clean energy and petroleum)
Ref: 1000903”

Prepared by the Gender and Energy Technical Advisory Team
(GETAT)

Consortium: ETC/ENERGIA in association
Nord/Sør-konsulentene
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# TABLE OF CONTENTS

1 **INTRODUCTION** 3  
2 **SUPPORT FOR GENDER MAINSTREAMING IN NORAD’S ENERGY PROGRAMMES** 3  
3 **INTRODUCING THE GENDER AND ENERGY TECHNICAL ADVISORY TEAM (GETAT)** 3  
4 **TECHNICAL ASSISTANCE FOR GENDER MAINSTREAMING** 4  
5 **EXPECTED OUTCOMES AND OUTPUTS OF THE CONSULTANCY** 4  
6 **GENDER AND ENERGY TOOLS AND METHODS** 5  
   6.1 Rapid Gender Assessment 6  
   6.2 Gender Strategies and Action Plans 6  
   6.3 Gender Organisational Analysis 7  
   6.4 Gender Training and Capacity Development 8  
   6.5 Gender Audits 9  
   6.6 Gender-Responsive Budgeting 9  
   6.7 Good/Best Practices and Lessons Learned 10  
   6.8 Monitoring and Evaluation (M&E) 11  
7 **CONTACT INFORMATION** 13  

**ANNEX 1:** CONTACT INFORMATION FOR THE GENDER AND ENERGY TECHNICAL ADVISORY TEAM 14  

**ANNEX 2:** BASIC TOOLS FOR GENDER MAINSTREAMING IN ENERGY PROJECTS 16  
   1. Gender Analysis 16  
   2. Sex-Disaggregated Data 17  
   3. Gender Goals and Gender-sensitive Indicators 17
1 INTRODUCTION

This document introduces the type of support the Gender and Energy Technical Advisory Team (GETAT) team can provide to Norad, Norwegian Embassies and their partners in incorporating a gender sensitive approach into the design and implementation of projects. This technical assistance will specifically support projects developed under Oil for Development and Clean Energy for Development. Developing synergy with other sectors e.g. water can also be supported.

2 SUPPORT FOR GENDER MAINSTREAMING IN NORAD’S ENERGY PROGRAMMES

The Norad Action Plan for Women's Rights and Gender Equality (WRGE) (referred to as the Action Plan) that was launched in 2007 emphasized the importance of gender sensitivity in energy as one of the five priority areas of Norwegian development cooperation. The plan recognised that energy development and cooperation can enhance gender equality and the economic empowerment of both men and women. The plan states that Norway will be at the forefront of efforts to ensure that both women and men participate at all levels in the management of natural resources in partner countries; contribute to the creation of jobs and livelihoods for both women and men; support sustainable, safe energy solutions that ease women's burden of work and improve their access to health services and education; support the development and use of clean energy solutions, such as solar energy; and promote the active participation of women in decision-making and implementation processes.

ENERGIA, the international network on gender and sustainable energy (www.energia.org), has been contracted to provide technical advice and support to strengthen gender mainstreaming in the Oil for Development and Clean Energy for Development Programmes for a period of three years. This document provides an introduction to the way in which this advice and support will work.

3 INTRODUCING THE GENDER AND ENERGY TECHNICAL ADVISORY TEAM (GETAT)

To implement the consultancy, ENERGIA has pooled together a consortium of experts that represents some of the best available experience and expertise in gender and clean energy and petroleum fuels, internationally and in specific countries. The consortium, referred to as the Gender and Energy Technical Advisory Team (GETAT), is managed by Sheila Oparaocha and Soma Dutta of ETC Netherlands, the organisation that host the ENERGIA international network.

At the international level, technical assistance is provided by a team of three senior gender and energy consultants:

- **Joy Clancy**, University of Twente (gender and clean energy expert)
- **Dorothy Lele**, The Human Dimension (gender and oil for development expert)
- **Christine Wiik**, Nord/Sør-konsulentene DA (gender and development expert)

Each of these experts is responsible for providing technical advice/back stopping to national gender and energy experts and teams, based on their areas of expertise, regional and country experience, to ensure that the outputs and deliverables from the consultancy are of reputable international standard.

In addition, three senior international energy consultants with experience in the power and rural energy/electrification sub sectors will act as resource persons to peer-review and provide technical advice on the practical applicability of gender mainstreaming interventions from an energy perspective:

- **Ad Zomers**, ETC Netherlands (power sector expert)
- **Jon Exel**, ETC Netherlands (rural energy/electrification expert)
- **Margaret Matunga**, University of Twente (rural energy/electrification expert)
To backstop its work in Oil for Development country programmes, the GETAT will work with PETRAD, a non-profit Norwegian government foundation that support Norad’s competency building in the petroleum sector.

Eight national gender and energy consultants will lead in-country planning, implementation and monitoring of gender mainstreaming interventions, working closely with NORAD’s partners in the respective countries.

- **May Sengendo**, East Africa Energy Technology Development Network-EAETDN (Gender and Energy Expert for Uganda and Madagascar)
- **Rose Mensah-Kutin**, ABANTU for Development (Gender and Energy Expert for Ghana and Liberia)
- **Christina Aristanti**, Yayasan Dian Desa (Gender and Energy Expert for Timor-Leste)
- **Chike Chiejina Chikwendu**, Friends of the Environment (Gender and Energy Expert for Nigeria and Sudan)
- **Indira Shakya**, Centre for Rural Technology Nepal (Gender and Energy Expert for Nepal)
- **Chandirekera Sarah Mutubuki-Makuyana**, Practical Action Southern Africa (Gender and Energy Expert for Mozambique and Angola)
- **Gisela Ngoo**, Tanzania Traditional Energy Development and Environment-TaTEDO (Gender and Energy Expert for Tanzania and Ethiopia)
- **Gladys Rojas Portillo**, ENERGETICA (Gender and Energy Expert for Bolivia)

An overview of the GETAT that includes contact details is given in Annex 1.

### 4 TECHNICAL ASSISTANCE FOR GENDER MAINSTREAMING

As part of its work, the GETAT offers the following services to Norad, Norwegian Embassies and partners in the Clean Energy for Development and the Oil for Development Programmes to enable them to mainstream gender in their policies, procedures and practices:

- Assistance in developing gender-sensitive objectives, outcomes, goals, indicators, and monitoring & evaluation protocols.
- Identification of the gender connections and impacts related to policies, strategies and activities, legal and contractual frameworks, environmental regulations and guidelines.
- Conduct a Gender Organisational Assessment (GOA)
- Design and conduct Gender Audits and Gender Budgeting
- Provide Capacity Building Programmes
- Assistance in developing and implementing Country & Programme Gender Action Plans,
- Contribute to gender aware communications strategies
- Develop policies and strategies to attract and retain more women in energy sector institutions
- GETAT is also able to offer:
  - Reviews of Terms of References (ToRs)
  - Participate as gender and energy experts in missions
  - Designing ToRs for gender desks.
  - Arranging workshops, trainings and networking events with actors in cooperating countries, Norway and international forums

### 5 EXPECTED OUTCOMES AND OUTPUTS OF THE CONSULTANCY

- **Baseline information** on how gender is mainstreamed in Norad’s clean energy and oil for development cooperation and in its partner institutions.
- **Gender strategies and action plans** that outline planned activities to address gaps that hinder efforts for mainstreaming gender in Norad’s energy project portfolio.
- **Gender sensitive quantitative and qualitative indicators** for monitoring gender-integrated outcomes and impacts based on gender sensitive goals and objectives.
- **Gender assessments** of energy sector programmes and partners, with results included into the programming cycle in order to increase accountability for results.
- **Gender training and coaching programmes** customized to the country or programme context.
- **Enhanced capacity, skills and awareness** of managers and implementers of Norad’s energy projects to integrate gender concerns into their projects.
- **Gender audits** of energy sector policies and programmes resulting in greater ownership of interventions.
- **Gender organisational analysis** of institutional partners to develop and implement gender action plans and to measure gender related organisational change.
- Capacity building in **gender-sensitive budget initiatives**.
- **Institutionalization of gender mainstreaming** in Norad’s energy organizations and projects with gender structures, processes, budgets and practices.
- **Monitoring and evaluation plans** with key gender-sensitive performance indicators that will enable Norad and its country partners to assess and report on the progress of mainstreaming gender within their energy projects and to make improvements where necessary.
- Body of **best practice** first-hand experiences that demonstrate **HOW** gender-specific impacts and outcomes can be generated in clean energy and petroleum projects.
- **Increased awareness** amongst Norad staff, management and development partners at national and international level on gender mainstreaming in the energy sector.
- **New opportunities for social and economic empowerment of women** in Norad’s energy projects.
- **Delivery on gender mainstreaming commitments** included in staff performance reviews.

### 6 GENDER AND ENERGY TOOLS AND METHODS

GETAT works using a number of tools and methods to support the technical assistance it will provide to national energy (oil for development and clean energy) programmes. These include the following that are further elaborated in this document:

- Rapid Gender Assessments
- Gender Strategies and Action Plans
- Gender Organisational Analysis
- Capacity building of partners and Embassy staff for gender mainstreaming in the energy sector
- Gender Training and Capacity Development
- Gender Audits
- Documentation of good/best practices and lessons learned of gender mainstreaming in the energy sector
- Monitoring and Evaluation frameworks and protocols
6.1 Rapid Gender Assessment

A rapid gender assessment is a broad appraisal of the major gender aspects and issues in a specific country which gives a general overview of the key institutions, stakeholders, policies, energy availability and beneficiaries related to Norwegian energy sector assistance. It uses gender analysis and sex-disaggregated data to provide the high-quality gender analytical information required for policy-making, planning and monitoring, and is a basic step in initiating gender mainstreaming in development co-operation.

Elements of a gender assessment:
- collection of baseline sex-disaggregated data (from primary and/or secondary sources) on energy use, energy sector employment and impacts of energy development;
- gender analysis of energy policy, regulatory frameworks and budgets and energy use;
- capacity assessments of institutional partners.

The gender assessment identifies key gender issues and sets the stage for the next steps in gender mainstreaming, which are usually developing a gender strategy and gender action plan.

Activities
- Preparation of data collection tools (checklist for gender review of documents, questionnaires for key stakeholder interviews, etc)
- Review of relevant documents, preparation of work plan

3 week country visit
- Meetings with partners to agree on the methodology and work plan,
- Interviews, site visits & data collection,
- Analysis of findings and report writing from home base.

Estimation of time duration from start to end of activity: 3 months

Human Resources: ENERGIA international gender and energy expert, ENERGIA national energy and gender advisor, 1 research assistant, international energy resource person for peer review

Budget Estimate: Euro 60,000 - 70,000

6.2 Gender Strategies and Action Plans

Once the gender assessment is completed, a participatory workshop(s) is organised with partners and stakeholders to consider the results and recommendations and to decide on a strategy and action. This requires considering and reaching consensus on overall gender goals and objectives, and then developing related outcomes and indicators (see Annex 2: Basic Tools). Along with responsibilities, timelines and required resources, this forms a Gender Strategy.

Once the Strategy is agreed upon, needed action can be identified to address the gaps and targets.

Steps in developing a Gender Strategy and Gender Action Plan:
- Present findings from the Gender Assessment to partners and stakeholders.
- Define gender goals, objectives and outcomes for the targeted programme or institution.
- Outline action needed based on gaps and issues identified in the gender assessment.
- Identify institutional responsibilities, timeframe and resource allocation.
- Agree on a monitoring and evaluation (M&E) protocol with gender sensitive indicators and targets for tracking the performance of activities, outputs and outcomes.
- Implement the GAP and M&E protocol (with GETAT Backstopping).
Activities

- Preparation of workshop agenda and inputs.
- Meetings with partners to agree on the process and workshop agenda.
- Organize and conduct workshop(s) with partners and stakeholders.
- Follow-up interviews and data collection.
- Draft report and Action Plan presented to the partner for validation.
- Final report.

Estimation of time duration from start to end of activity: 3 months

Human Resources: ENERGIA international gender and energy expert, ENERGIA national energy and gender advisor, international energy resource person for peer review, 2 research and logistics assistants

Budget Estimate: Euro 50,000 - 60,000

6.3 Gender Organisational Analysis

Inter-governmental and national institutions are increasingly conducting “Gender Organisational Analysis” which combine evaluation and auditing methodologies. The main objective of a Gender Organisational Analysis is to promote organizational learning at the individual, section/division and organizational level on how to develop and effectively implement gender mainstreaming strategies in policies and programmes. A Gender Organisational Analysis differs from gender assessments mainly in its use of participatory processes, whereas assessments are generally done by external assessors with limited consultation with key informants.

A gender organisational analysis is achieved through a critical evaluation of the strengths and weaknesses of an institution’s programmes and policies, as well as through an assessment of existing constraints and opportunities within an organization to comply with political commitments to gender mainstreaming at the level of the organization, work unit and individual.

A gender organisational analysis is a review and assessment that:

- Establishes a baseline;
- Identifies critical gaps and challenges;
- Recommends ways of addressing gaps and suggests effective strategies;
- Considers whether internal practices and related support systems for gender mainstreaming are effective and whether they are being followed;
- Monitors and assesses the relative progress made in gender mainstreaming;
- Develops policies and strategies to attract and retain more women in energy sector institutions;
- Documents good practices towards the achievement of gender equality.

Using a participatory self-assessment methodology, a gender organisational analysis takes into account objective data and staff perceptions of the achievement of gender equality in an organization in order to better understand concrete and unsubstantiated facts and interpretations. In summary, a gender organisational analysis:

- Enhances the collective capacity of an organization to examine its activities from a gender perspective and promote gender equality;
- Helps to build organizational ownership for gender equality initiatives; and
- Sharpens organizational learning on gender through a process of team-building, information sharing and reflection.

Activities

- First mission to identify a national team and develop the methodology and work plan,
- Development of primary and secondary data collection tools (checklist for gender review of documents, questionnaires for key stakeholder interviews, etc),
• Review of international and national documents,
• Field work: interviews & site visit & administration of questionnaires,
• Analysis of findings and report writing (gaps found & recommendations),
• 2nd visit to finalize reports & present findings to partners,
• Final report sent to partner.

**Estimation of time duration from start to end of activity:** 5 months

**Human Resources:** ENERGIA international gender and energy expert, ENERGIA national gender and energy expert, international energy resource person for peer review, 2 research assistants

**Budget Estimate:** Euro 70,000 – 80,000

## 6.4 Gender Training and Capacity Development

Capacity development underlies all gender support, to varying degrees. The long term goal of gender support is to enable partners to continue gender mainstreaming themselves, and requires various types of gender training, depending on the awareness, capacity and responsibilities of the target group, including training on gender awareness, gender analysis, gender budgeting, employment issues including workplace harassment, etc.

Gender awareness training aims at attitudinal and behavioural changes, leading to a more effective consideration of gender equality issues. The purpose of gender training is that through the process and exchange of experiences, participants begin to question commonly held beliefs about women’s and men’s abilities and roles particularly in relation to the energy sector and acquire new skills to conduct their regular duties using a gender lens.

Awareness raising workshops, gender sensitization training and follow up coaching of energy project implementers and decision makers are used to increase understanding, build consensus and commitment for gender mainstreaming in the energy sector and to develop skills for implementing the gender strategy and action plan. Gender is also to be integrated as part of the curriculum in training courses for program and project partners, and ToRs adapted to include gender expertise.

Leadership training and mentoring programs to develop the confidence and capacities of female staff are also often needed. Male staff need sensitization about the benefits of gender mainstreaming bring to an organization and about the need to create space for women to participate effectively.

Gender training programmes should:

- Raise the level of awareness and understanding of gender equality issues and their related concepts and language particularly in relation to the energy sector.
- Support changes in attitudes and behaviour and strengthen the vision, capacity and processes needed to build a more gender-responsive organizational culture.
- Provide participants with the skills necessary to appropriately ensure the effective integration of gender equality issues in all stages of the policy, programming and project cycle, thereby broadening the institution’s mainstreaming efforts and reinforcing its capacities to achieve major national gender targets.
- Promote the integration of gender equality issues in energy policies and programmes at the national level, promote their visibility and improve their future coverage.

**Activities required for a sample 3-day training program:**

- Needs assessment through consultations with participants
- Preparation of training program, modules and materials
- Delivery of training
- Report, including recommendations for further action
6.5 Gender Audits

A gender audit is an approach for undertaking a gender analysis of an energy policy, programme and related projects which has been developed and used by ENERGIA in Africa and Asia\(^1\). An audit helps determine suitable entry points for gender mainstreaming into energy policies, programmes and projects. It can provide information on the inherent potential direct or indirect benefits of a development initiative on women and men: who is likely to benefit or lose from a given initiative. The approach enables an exploration of assumptions about issues such as the distribution of energy resources and the impact of culture and traditions on the gendered roles and responsibilities.

The approach is participatory and aims to involve key stakeholders to encourage ownership and commitment of identified interventions by those responsible for the implementation and the intended beneficiaries. The three meetings held as part of the process are seen as key in establishing ownership of the outcome of the audit: Launch meeting with partners; report presentation meeting with partners; validation meeting with broad group of stakeholders. Ownership increases the likelihood of success of interventions.

The gender audit aims to collect from secondary sources sex-disaggregated energy statistics and data. The data is analysed using a number of the tools and analytical frameworks described elsewhere in this document such as gender assessment, gender organisational analysis, identifying gender goals, and undertaking gender budgets.

Activities:
- Define with partners the boundaries of the audit
- Establish the audit team and train them in methods
- Finalise the work plan and the allocate tasks and responsibilities of individual team members
- Data gathering and analysis
- Preliminary report preparation
- Presentation of preliminary report to partners
- Validation workshop with broad representation of stakeholders to develop an action plan

Estimation of time duration from start to end of activity: 5 months

Human Resources: ENERGIA international gender and energy expert, ENERGIA national gender and energy expert, international energy resource person for peer review, 2 research assistants

Budget Estimate: Euro 70,000 – 80,000

6.6 Gender-Responsive Budgeting

Gender-responsive budgeting (GRB) is government planning, programming and budgeting that contributes to the advancement of gender equality and the fulfillment of women's rights. It identifies and reflects needed interventions to address gender gaps in sector and local government policies,

\(^1\) [http://www.energia.org/knowledge-centre/gender-audit-reports/]
Gender-responsive budgets are not separate budgets for women, but instead, general budgets that are planned, approved, executed, monitored, and audited in a gender-sensitive way. In contrast to the other budget work that focuses on the distributional impact of budgets, such as pro-poor budgeting, gender-responsive budgeting does not treat households as a single unit but highlights that the access to and control over resources and bargaining power of household members differ.

Mainstreaming gender into national budgeting processes is a long term process that requires a committed effort from the Government and senior managers, however, the process can be initiated by GETAT linked to a gender audit.

**Activities:**
- Needs assessment through consultations with partners and stakeholders
- Gender analysis of targeted budgets and accounts
- Preparation of training program, modules and materials
- Delivery of training
- Coaching support
- Report, including recommendations for further action

**Estimation of time duration from start to end of activity:** 5 months

**Human Resources:** ENERGIA international gender and energy expert, ENERGIA national gender and energy expert, international energy resource person for peer review, 2 research assistants

**Budget Estimate:** Euro 70,000 – 80,000

### 6.7 Good/Best Practices and Lessons Learned

Best practice is a method to demonstrate the practical ways in which energy programmes can mainstream gender and thereby improve governance, provide access to services, protect the environment and support economic development. This is done through documenting the process of gender mainstreaming in the form of case studies and practical handbooks for learning by other energy projects and practitioners.

Drawing on networks and partnerships with gender allies and stakeholders (government, NGOs, donors, utilities, energy service companies, etc) contributes to the success of gender mainstreaming in the energy program/project/institution and the potential for its replication more widely. At the national and international levels, evidence/best practice of gender impact and change in energy projects can be used for advocacy and lobbying to influence energy policies and political processes.

Documentation and communication of best practice is a powerful tool for:
- Analyzing emerging issues;

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3 [www.unifem.org](http://www.unifem.org)
• Identifying and analyzing lessons learned.
• Networking with the people and organisations involved in implementation;
• Capacity-building including new knowledge management tools and methods.
• Technical cooperation through the matching of supply with demand for proven expertise and experience.
• Policy development and influence based on what works.

Activities:
• Documentation of effective interventions and results using reports of successful initiatives
• Publication, printing (1000 copies) and dissemination to key stakeholder and on the Norad website
• Production of a short (15 minutes) documentary film for distribution on different websites (Norad, Energia, YouTube, UN, etc.), useful for training sessions, promotion in seminars/conferences etc.
• Printing and dissemination to key stakeholders and at least 4000 ENERGIA

Estimation of time duration from start to end of activity: 6 months

Human Resources: ENERGIA international gender and energy expert, professional editors (for video and publication), English editor, graphic designer and printers.

Budget Estimate: Euro 60,000 – 70,000

6.8 Monitoring and Evaluation (M&E)

Monitoring involves the observation of an intervention and its circumstances for changes occurring over time. This allows for the identification of potential bottlenecks and the provision of timely interventions to ensure that objectives are reached.

Monitoring takes place at two different levels:
  a) Impact monitoring: monitoring outputs and outcomes or progress towards the goals and expected impacts of the energy project or program; and
  b) Process monitoring: monitoring the implementation process i.e. the institutionalization of gender mainstreaming in the energy project/organization.

Evaluation is the systematic analysis of an intervention’s impact, effectiveness, efficiency and relevance. Norad’s Results Management Guide states that evaluations or reviews “should be seen as complementary to regular monitoring and should be used selectively to deal with information that monitoring cannot adequately provide. It is important that donors, as far as possible, align their reporting and evaluation requirements with the partner’s own planning, reporting and monitoring and evaluation system.”

Both monitoring and evaluation require measurable targets and gender-sensitive indicators linked to gender goals, which need to be developed early in the gender mainstreaming planning process, as part of action planning. A baseline for measuring progress on performance indicators needs to be established through the initial fieldwork. ALL project performance indicators need to be disaggregated by sex wherever possible, so as to identify the gender-differentiated impact of interventions.

The GETAT can contribute to the development and implementation of monitoring and evaluation systems, assist partners in undertaking gender-related reviews, and/or participate in wider reviews and evaluations to mainstream gender and ensure that gender results are identified, analysed and recorded.

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Norad, Results Management in Norwegian Development Cooperation: A practical guide, p.17-18
6.8.1 Developing a monitoring and/or evaluation plan or protocol

**Activities:**
- Engendering the results framework with gender-sensitive goals, objectives, outcomes and indicators
- Checking existing data sources
- Preparing a process and instruments for monitoring and/or evaluation
- Meeting with project partners to reaching agreement on the protocol
- Final M&E protocol

**Estimation of time duration from start to end of activity:** 2 months

**Human Resources:** ENERGIA international gender and energy expert and ENERGIA national gender and energy expert, international energy resource person for peer review

**Budget Estimate:** Euros 20,000 – 30,000

6.8.2 b) Assisting a partner to monitor a specific project or program for gender integration

**Activities:**
- Preparation and conduct of a workshop on monitoring gender results
- Regular visits over a 2-year period to coach the partner
- Monitoring Reports, including recommendations for further action

**Estimation of time duration from start to end of activity:** 4 visits over a 2 year period perhaps combined with other work

**Human Resources:** ENERGIA international gender and energy expert, ENERGIA national gender and energy expert, international energy resource person for peer review

**Budget Estimate:** 60,000 – 70,000
7 CONTACT INFORMATION

For more information and to request the services of GETAT, please contact:

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Norwegian Agency for Development Cooperation
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Or

**Lasse Vannebo**
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| Sheila Oparaocha      | ETC                         | International Programme Manager               | All countries                         | s.oparaocha@etcnl.nl       | • Overall project management
|                       |                             |                                               |                                        |                            | • Liaising with Norad as main contact for the consultancy
|                       |                             |                                               |                                        |                            | • Budget control and timely reporting of financial statements               |
| Soma Dutta            | ETC                         | Assistant Programme Manager                   | All countries                         | abhisoma@gmail.com         |                                                                                |
| Joy Clancy            | University of Twente        | International Gender and Clean Energy Expert  | Nepal, Uganda, Ghana, Tanzania         | j.s.clancy@utwente.nl       | • Providing senior level technical guidance/backstopping to gender mainstreaming in energy projects
<p>|                       |                             |                                               |                                        |                            | • Conducting fact finding, start-up, and monitoring missions to focus countries |
| Dorothy Lele          | The Human Dimension         | International Gender and Oil for Development Expert | Mozambique, Nigeria, Angola, Sudan, Timor-Leste | <a href="mailto:dorothylele@gmail.com">dorothylele@gmail.com</a>    | • Providing gender tools, methodology, capacity building, and policy influencing. |
| Christine Wiik        | Nord/Sør-konsulentene DA    | International Gender and Development Expert   | Liberia, Ethiopia, Madagascar, Bolivia | <a href="mailto:cw@nordsor.no">cw@nordsor.no</a>              |                                                                                |
| Ad Zomers             | Independent Consultant      | Resource Person – Energy Expert               | International                         | <a href="mailto:a.zomers@inter.NL.net">a.zomers@inter.NL.net</a>       | • Providing senior level technical guidance to gender and energy experts to ensure the practicalities of the interventions from an energy perspective. |
| Jon Exel              | ETC                         | Resource Person – Energy Expert               | International                         | <a href="mailto:jexel@exelonline.org">jexel@exelonline.org</a>        | • Peer review gender tools and products from an energy perspective.            |
| Margaret Matinga      | University of Twente        | Resource Person – Energy Expert               | International                         | <a href="mailto:mmat_001@yahoo.com">mmat_001@yahoo.com</a>          |                                                                                |</p>
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| May Sengendo                  | EAETDN                           | National and Expert| Gender Energy       | sengendo@infocom.co.ug       | • Leading national teams; planning, managing, monitoring gender mainstreaming interventions at national level.  
|                               |                                  |                   | Uganda, Madagascar     |                              | • Documenting and publishing results of national gender mainstreaming interventions in reports, case studies and outreach publications. |
| Rose Mensah-Kutin             | ABANTU for Development           | National and Expert| Gender Energy       | eno_gh@yahoo.com             |                                                                               |
|                               |                                  |                   | Ghana and Liberia     |                              |                                                                               |
| Christina Aristanti           | Yayasan Dian Desa;               | National and Expert| Gender Energy       | christina@arecop.org         |                                                                               |
|                               | Friends of the Environment;      |                   | Timor-Leste          |                              |                                                                               |
| Chike Chiejina Chikwendo      | Centre for Rural Technology Nepal| National and Expert| Gender Energy       | c_chikwendo@hotmail.com       |                                                                               |
|                               |                                  |                   | Nigeria, Sudan        |                              |                                                                               |
| Indira Shakya                 | Practical Action Southern Africa  | National and Expert| Gender Energy       | ishakya99@yahoo.com          |                                                                               |
|                               |                                  |                   | Nepal                |                              |                                                                               |
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| Gladys Rojas Portillo         | ENERGETICA                       | National and Expert| Gender Energy       | miguel@energetica.org.bo     |                                                                               |
|                               |                                  |                   | Bolivia              |                              |                                                                               |
ANNEX 2: BASIC TOOLS FOR GENDER MAINSTREAMING IN ENERGY PROJECTS

Gender analysis and sex-disaggregated data are basic tools used in most of the preceding methodologies. Some details are given below.

1. Gender Analysis

Gender analysis is a process of analyzing the way in which women’s and men’s, or girls’ and boys’ experiences and needs differ. It draws upon sex-disaggregated data, and analyzes the causes and consequences of gender differences and inequality. Various analytical frameworks are used to analyze productive and reproductive activities, and access to and control over resources.

In ENERGIA’s experience, the most widely-used gender analytical frameworks⁵ are not sufficient for use in the energy sector⁶. Firstly they give no direct guidance on how to determine desired gender development directions which need to be explicit, not only for reaching objectives, but also because more clarity is needed in the energy sector where the case for gender mainstreaming is less readily accepted. Secondly, they do not ask very simple questions about energy: What forms of energy do women use, for what activities? What forms of energy do men use, for what activities? What kinds of energy would increase women’s welfare, increase their productivity and help empower them? And how do I need to design my policy, programme or project to ensure that women have some say over the outcomes?

For this reason, ENERGIA uses a framework and tools based on the specific requirements of the particular context⁷ under examination, in combination with general gender tools, as appropriate. Examples of tools used are:

- **Gender matrices**: tables which compile data on male/female differences (e.g. in roles and access to resources) and tend to offer mainly quantitative data.

- **Gender checklists**: sets of questions which provide a structure for compiling gender-related data, and which mainly require qualitative responses.

- **Stakeholder analysis**

  Enables analysis from a gender perspective of energy sector stakeholders: what do they consider the main issues in relation to the energy sector, what motivates their involvement and how they will respond to gender mainstreaming in relation to Norwegian energy sector assistance. It will help answer efficiency questions such as identifying synergy with other donors, local consultants (female or male with good gender sensitivity) who could implement Norwegian support.

- **Gender organizational assessment of energy sector partners**

  This tool provides an overall picture of the strengths and weaknesses of an organisation, particularly in relation to gender and energy. The assessment can be based on secondary data, or it can be carried out as a participatory exercise. It will help identify any capacity development in terms of gender mainstreaming. It will help answer efficiency and effectiveness questions.

⁵ eg. Gender Empowerment Assessment (GEA) Manual, by Else Skjønsberg for Norad; Harvard Gender Analysis Framework; Gender Planning in the Third World by Caroline Moser; Gender Equality and Empowerment Framework by Sara H Longwe; People Oriented Planning by UNHCR


⁷ These tools can be found in The Gender Face of Energy on the ENERGIA website www.energia.org/knowledge-centre/training-material/energias-generic-training-modules/
• **Gender goals and indicators**
  What impacts from a gender perspective should be expected from Norwegian energy sector assistance? How can these be formulated as gender goals? What indicators should be used to measure the achievement of reaching those goals? It will help answer efficiency questions.

• **Gender and energy matrix**
  This tool maps the relationship between availability, access and affordability to energy by intended beneficiaries. It will help answer the questions related to effectiveness of the Norwegian energy sector assistance as well as its impact.

• **Rapid Social Assessment**
  Identification of gender issues related to the Norwegian energy sector assistance including who are the likely beneficiaries and how they will benefit or be disadvantaged. It will help answer effectiveness and impact questions.

• **Assessing Access and Control Over Resources**
  This tool helps to identify where adjustments need to be made to ensure that intended beneficiaries, particularly women, are able to gain access to and to benefit from energy as well as their involvement in planning and implementing energy projects. It will help answer impact questions.

2. **Sex-Disaggregated Data**

Sex-disaggregated data refers to data that is separated or cross-classified by sex, presenting information separately for women and men, boys and girls. Sex-disaggregated data is required to realistically reflect roles, responsibilities, ownership and the general conditions of women and men in every aspect of their daily lives and work, for example, literacy rates, education levels, health status, business ownership, employment, wage differences, dependants, property ownership, loans and credit, and debts. Breaking down these data by sex allows the analyst to see gender differences and issues that are otherwise hidden.

3. **Gender Goals and Gender-sensitive Indicators**

One approach to incorporating gender into policies, programmes and projects is through the use of gender goals. These goals can reflect the different approaches: welfare, efficiency, equality/equity and empowerment. Different stakeholder groups participating in a programme or project can have different gender goals, which may or may not be explicitly articulated, as a motivation for their participation. Much donor policy is written in terms of women’s empowerment, however, in contrast, most energy projects are planned in welfare or efficiency terms.

There is often a gap between gender policies or goals and actual practice which can lead to misunderstandings about intentions (particularly in relation to empowerment) and can result in unmet objectives. Therefore, ENERGIA advocates the use of gender goals when formulating policies, programmes and projects so that objectives can be clear. The table below gives illustrative examples of gender goals, the type of issues addressed and possible energy interventions to meet needs.

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8 Donors usually aim at economic empowerment. While this is a crucial component of women’s empowerment, it may not be sufficient for women to gain control over their own lives.
<table>
<thead>
<tr>
<th>Gender Goal</th>
<th>Types of Needs/Issues Addressed</th>
<th>Possible Energy Intervention</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Welfare</strong></td>
<td><strong>Practical need</strong> Reduce the time taken and the load that has to be carried</td>
<td>• Improved wood stoves • Bottled gas (LPG: liquefied petroleum gas)</td>
</tr>
<tr>
<td>Reduce drudgery associated</td>
<td></td>
<td></td>
</tr>
<tr>
<td>with cooking on woodfuel</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Productivity</strong></td>
<td><strong>Productive need</strong> More efficient equipment</td>
<td>• Electric power connection and equipment</td>
</tr>
<tr>
<td>Women to increase their</td>
<td></td>
<td></td>
</tr>
<tr>
<td>income through improved</td>
<td></td>
<td></td>
</tr>
<tr>
<td>output</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Empowerment</strong></td>
<td><strong>Strategic interests</strong> Women need confidence to enter into discussion with men and time in</td>
<td>• Project committees should have minimum 50% female members • Street lights</td>
</tr>
<tr>
<td>Women should participate on</td>
<td>the evenings to participate in meetings</td>
<td></td>
</tr>
<tr>
<td>an equal basis with men in</td>
<td></td>
<td></td>
</tr>
<tr>
<td>decision making</td>
<td></td>
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</tr>
</tbody>
</table>

Progress towards achieving gender goals can be measured and monitored through gender sensitive indicators. Indicators can be system related (referring to who actually gets to use and benefit from the energy provided by the policy, programme or project) or development related (what the impacts of energy are on men’s/women’s lives).

Certain aspects of gender (in)equality are particularly difficult to measure. Some are difficult to conceptualise, such as the gender dimensions of poverty or women’s empowerment, while others are sensitive issues such as gender-based violence (GBV), or occur in sensitive contexts such as armed conflict. Measuring poverty from a gendered perspective requires using a range of gender-sensitive indicators which draw attention to gender power relations at both the household and societal levels. Useful approaches include ‘time poverty’ studies, which can be used to measure women’s unpaid care work, and gender-sensitive participatory poverty assessments. Combinations of multi-level and multi-dimensional indicators are needed to effectively measure women’s empowerment. Qualitative data are often incorporated into assessments of women’s empowerment in an effort to capture these complexities.