

Gender and international financial institutions

A guide for civil society



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Introduction

The aim of this guide is to assist Civil Society Organization (CSOs) activists in Central and Eastern Europe, as well as the Caucasus and Central Asia (ECA) region to readily identify investment projects and programmes carried out by the International Financial Institutions (IFIs) that are likely to have detrimental gender impacts and influence them, through advocacy work during the project preparation, as well as through compliance mechanisms. The Guide addresses several of the IFIs active in the region, including the World Bank Group, European Bank for Reconstruction and Development, European Investment Bank and Asian Development Bank, as well as the European Union financial instruments – the European Neighborhood and Partnership Instrument and the Development Cooperation Instrument.

The guide consists of an overview of the gender relevant policy framework and initiatives at IFIs and a simple gender checklist which should help CSOs in determining whether gender considerations have been addressed during the preparation and implementation of IFI-financed projects and programmes. The checklist is divided into three parts:

- broad gender considerations during the project/programme preparation, monitoring and evaluation stages,
- gender issues that need to be addressed during the assessment of projects in particular sectors
- an overview of gender assessment tools, different methodologies and gender sensitive indicators.

Through IFIs and Overseas Development Assistance developing countries receive different types of financing, including direct budgetary support such as Poverty Reduction and Growth Programmes (World Bank) and General and Sectoral Budgetary support (EU), as well as money for infrastructure projects, development of the private sector including micro-financing, energy efficiency and other lending schemes (EIB, IFC, EBRD, ADB, World Bank). The projects and programmes supported by IFIs inevitably affect people's lives and the environment, often in a negative way. Although IFIs operate under the mandate of fostering sustainable development, economic growth and poverty reduction, some of their financing negatively affects vulnerable segments of society – such as women, children, the elderly, the economically vulnerable, and ethnic minorities.

Research has shown that IFI policy-based loans “disproportionately harm poor women, who often become “shock absorbers” for neoliberal economic reforms like trade liberalization, privatization of public enterprises, government retrenchment, social spending cutbacks, user fees for essential services and financial sector reforms. Women are often the first to lose their jobs, first to forego healthcare and education, and first to enter flexible labor markets with poor working conditions

during IFI-imposed economic reforms. Furthermore, it is usually women who must quit income-earning jobs to provide health and child care for their families.”¹

Infrastructure projects, too, can have negative gender-specific impacts. CEE Bankwatch Network found that in the Baku-Tbilisi-Ceyhan pipeline supported by the IFC and EBRD, and the Sakhalin II oil extraction project, predominantly foreign male workers who relocated to work on the construction, combined with feeble gender policies, brought prostitution, human trafficking, poverty, HIV/AIDS and greater burdens for local communities.²

Sometimes the gender impacts can be easily identified from the beginning of the project, while in other cases a thorough analysis of project documentation is needed in order to understand the potential impacts, and to prevent negative results and encourage positive ones. Any project that has environmental and socio-economic impacts have gender impacts, and if not properly assessed from the beginning the impact may not be recognizable until it is quite late. For example, the World Bank widely supported mine closure in Russia, Poland and Ukraine from the late nineties, which had drastic gender-specific impacts. For example many men migrated and the majority of the population who stayed in the impoverished cities were women, especially the elderly.³

Increasingly, due in large part to pressure from civil society, IFIs have recognised that gender equality is a precondition to sustainability and poverty reduction and that they need to increase efforts to close the gender gap through development and transition aid and lending. Over the last few years, IFIs have developed policies and strategies to address gender inequality and leverage the untapped potential of women in emerging markets.

IFI gender policies and practices overview

The World Bank - (IDA and IBRD)

- Operational Policy 4.20 on Gender and Development⁴ – aims to help member countries address gender inequalities in World Bank investment projects. It requires Bank staff to include gender concerns in all investment projects but explicitly excludes programme loans⁵ from the requirement to address gender disparities.
- The bank's Involuntary Resettlement policy, OP 4.12, also stipulates that special attention must be paid to vulnerable populations, including women.
- Gender Strategy (WB 2002) - represents a "business plan" to mainstream gender into the Bank's development assistance, highlights the importance of gender analysis in policy lending and includes "good practice examples". However, the bank's other policies do not include a requirement for gender analysis in policy loans.
- Gender Action Plan (2007-2010 and 2011-2013) - applies to the whole World Bank Group including the International Finance Corporation (IFC). It seeks to intensify the implementation of the World Bank Gender policy and strategy and mainstream gender into policy operations. However, it still fails to address a number of major gender related issues: it lacks a human rights framework, has an incomplete approach to reproductive health and lacks robust, transparent, gender related data⁶.
- The World Bank's annual World Development Report (WDR) is to be devoted to gender for the first time. To be published in late 2011, the WDR 2012: Gender Equality and Development will examine gender equality as a core of development.⁷

The World Bank's "Applying Gender Action Plan Lessons: A Three Year Road Map for Gender Mainstreaming" (the Road Map 2011-2013) evaluates the Bank's implementation of the Gender Action Plan (2007-2010), and presents a plan for the Bank to strengthen gender mainstreaming in its operations.

The World Bank Independent Evaluation Group (IEG) has evaluated the implementation of World Bank policy 2002-2008 and concluded that "implementation of the Bank's gender policy, initially strong, weakened in the latter half of the evaluation period." As a result, "the evaluation found a decline in the frequency of meaningful gender integration into [the Bank's country assistance strategies.] According to the IEG the one of the main reasons for this is that "the introduction of the GAP without appropriate policy foundations ... had the effect of blurring the Bank's overall gender policy." The IEG recommended putting in place proper accountability, evaluation and monitoring frameworks, and "restoring a broader requirement for gender integration at the project level." In addition, the USA-based NGO Gender Action clarifies, that "In addition to the problems of weak implementation, the Bank's gender policy excludes development policy loans. The report also criticizes the Bank's over-reliance on economic empowerment as the "sole means to achieve gender equality."⁸

In theory World Bank project design should ensure equal women's and /men's participation in decision-making, a gender analysis to establish potential impacts, and the proposal of gender monitoring mechanisms.

The International Financial Corporation (IFC)

Although the IFC forms a part of the World Bank Group, the World Bank Gender Policy does not apply to it.⁹ The IFC has neither a policy nor strategy on gender, but participates in World Bank Gender Action Plan. The IFC safeguard policy (2006) just mentions gender issues. According to Performance Criteria 1 “Social and Environmental Assessment and Management Systems (2006) may be used to ensure projects do not disproportionately harm women or men. According to PSI, “As part of the (Social and Environmental) Assessment, the client will identify individuals and groups that may be differentially or disproportionately affected by the project because of their disadvantaged or vulnerable status (including gender).” It is also stipulated by PSI that, “Where groups are identified as disadvantaged or vulnerable, the client will propose and implement measures so that adverse impacts do not fall disproportionately on them and they are not disadvantaged in sharing development benefits and opportunities.” Gender issues are addressed in the Guidance Note for Performance Standard 1. However, the importance of considering gender-related impacts of projects (both substantive impacts and issues related to processes, such as involvement in consultation and participation) should be reflected in the main Performance Standard text for Performance Standard 1 as well as throughout the Performance Standards.

There is an ongoing review (2009-2011) of the IFC safeguard draft sustainability framework. However, “despite having stated that gender is a key cross-cutting issue, IFC’s current draft (as of June 2011) merely requests clients to ‘minimize’ unintended gender differentiated impacts, and fails to include specific requirements to adequately assess and address potential impacts of IFC investment activities on the human rights of women and girls who are often disproportionately affected”.¹⁰

In addition, the IFC has two gender initiatives - Women in Business (WIN, formerly known as Gender Entrepreneurship Markets) and Private Sector Development – Gender (PSD-Gender). WIN aims to mainstream gender issues into all dimensions of IFC’s work and remove gender inequality to create an enabling business environment. The IFC also provides financial products and advisory services to:

- increase access to finance for women entrepreneurs
- reduce gender-based barriers in the business environment
- improve the sustainability of IFC projects

The Asian Development Bank (ADB)

The ADB has two gender policy documents, namely the Operational Policy/Bank Procedure on Gender and Development (Gender Policy 2003) and the Policy on Gender and Development (Gender Strategy 2008-2010). While the Gender Policy, which is mandatory, uses ‘gender mainstreaming’ to achieve “explicit integration of gender considerations in all aspects of ADB operations”, the Gender Strategy seeks to ‘mainstream’ gender to promote gender equity.

The priority goals of the Gender Policy are to:

- strengthen the gender capacity of developing member countries, especially to regarding the goals of the Beijing Platform for Action,
- improve gender analysis of proposed projects including addressing gender considerations in macroeconomic, sector, strategy and programming work,
- study the impact of economic reform programmes on women,
- increase the number of projects with Gender and Development Policy (GAD) classification,
- explore issues for women in the region,
- and increase ADB staff awareness of GAD.

However, the Gender Policy does not adequately address the gender implications of policy-based lending and macroeconomic reforms.

At the project level ADB policy requires an Initial Poverty and Social Assessment (IPSA), including gender, which is conducted during the preparation phase of the project cycle. The IPSA is publicly available upon completion. For gender-specific projects, a social development or gender specialist must prepare a Gender Action Plan (GAP). At the country level, this policy requires Country Strategy Programs (CSPs) to include a Country Gender Strategy to address gender concerns that have been identified in Country Gender Assessments. The Regional and Sustainable Development Department is responsible for assistance, monitoring and implementation of the policy in bank activities.

The European Bank for Reconstruction and Development (EBRD)

The EBRD's Environmental and Social Policy (2008) covers the environmental and social dimensions of sustainable development. The social dimension includes "(i) labour standards and working conditions including occupational health and safety and (ii) community impacts such as public health, safety and security, gender equality, impacts on Indigenous Peoples and cultural heritage, involuntary resettlement, and affordability of basic services."¹¹ It requires that the Environmental and Sustainability Department (ESD) is involved to ensure effective mitigation of gender impacts associated with projects by enforcing gender equality. The ESP requires tools and guidance to be revised so as to include a specific focus on adverse gender impacts and gender discrimination – among both the workforce and affected communities, in accordance with EU requirements.

The EBRD has developed two gender matrices, which identify gender issues relevant to the Performance Requirements of the Bank's 2008 Environmental and Social Policy. Gender Matrix 1 and Matrix 2 identify gender issues in reference to each of the Performance Requirements and to the requirements at sector level, respectively.

In addition, the EBRD in 2010 adopted an updated Gender Action Plan "to promote equality of opportunity and women's empowerment through its projects and seek to prevent gender discrimination and mitigate inequalities".¹² It also requires the assessment of the impact of investment and technical cooperation projects on gender equality and women's empowerment, including gender sensitive indicators. It requires the collection and public availability of data (including sex-disaggregated data) concerning women's economic participation and the relationships between gender equality, women's empowerment, growth and poverty reduction. Through the GAP, the EBRD commits to investigate three pilot countries - Georgia, Kyrgyz Republic and Romania - to map and assess the impacts of the EBRD's investments and develop tools to produce reliable base-line studies. A Gender Action Plan Coordinator and a Gender Adviser have been appointed to coordinate implementation of the Gender Action Plan.

European Union financial instruments

EU laws and policies strongly endorse gender equity as a critical aspect of promoting and protecting fundamental rights. This is mainly made up of various Treaty provisions and Directives concerning access to employment, equal pay, maternity protection, parental leave, social security and occupational social security, the burden of proof in discrimination cases and self-employment.

The EU strategy for equality between women and men (2010-2015) addresses the integration of equality between women and men into all EU policies and activities ("gender mainstreaming") to promote gender equality.

In principle, EU financial instruments, as well as the EU's in-house bank the EIB should adhere to EU law.

In the context of development cooperation the European Consensus on Development¹³ recognised gender equality as a goal in its own right, identifying it as one of the five common principles of EU development cooperation. It declared that “the promotion of gender equality and women’s rights is Instrumental in achieving all the MDGs¹⁴ and in implementing the Beijing Platform for Action¹⁵, the Cairo Programme of Action¹⁶ and the Convention on the Elimination of All Forms of Discrimination Against Women. The Development Cooperation Instrument (DCI) regulation aims at “promoting gender equality in development cooperation”; The European Neighborhood Policy identifies gender equality as one of the major shared values between EU and neighborhood countries, while the ENPI Regulation acknowledges that “Community assistance shall be used to support measures within the following areas of cooperation”, including “supporting policies to promote social development, social inclusion, gender equality, non-discrimination, employment and social protection including protection of migrant workers, social dialogues, and respect for trade union rights and core labour standards, including on child labour.”¹⁷

However, research undertaken for the European Parliament shows that while the EU actively pursues the development of infrastructure projects outside the EU, the environment, good governance and gender are ultimately low-funded issues.¹⁸¹⁹

The European Investment Bank (EIB)

The EIB Environmental and Social principles and standards (2009) acknowledge core labour standards including “Equal treatment and equal opportunity: no discrimination based on race, caste, origin, religion, disability, gender, sexual orientation, union or political affiliation, or age; no sexual harassment”.

This is the only note in the principles regarding gender equality, while the chapter on “Indigenous People and other vulnerable groups” highlights that “All policies, practices, programmes and activities developed and implemented by the promoter should pay special attention to the rights of vulnerable groups. Such groups may include indigenous people, ethnic minorities, women, migrants, the very young and the very old. The livelihoods of vulnerable groups are especially sensitive to changes in the socioeconomic context and are dependent on access to essential services and participation in decision-making.” The EIB’s Environmental and Social practices handbook states that on appraisal stage the bank staff should ensure that “minimum relevant social safeguard standards are being adhered to. These include core labour standards, standards for occupational and community health and safety, standards for dealing with involuntary resettlement and standards for the treatment of vulnerable groups, including women and indigenous peoples. Bank staff will endeavour to ensure that appropriate arrangements for effective consultation with stakeholders are put in place.”

The Guidance Note on the rights and interests of Vulnerable groups recognises that the protection of minority rights and the participation of minorities in decision-making are central to the founding principles of the EU and that “The evolution of human rights protection has strengthened anti-discrimination legislation particularly with respect to women and to employment.”

In relation to EIB projects outside of EU, the bank recognizes that “dealing with such minorities requires particular attention to be given to their cultural rights to maintain control over ancestral territory and to secure access to culturally appropriate sustainable livelihoods. A focus on, for instance, indigenous groups, like the focus on women, is a particular instance of the wider EU policies supporting social inclusion, non-discrimination and the rights of indigenous peoples expressed in the UN Human Rights Conventions.”

While the Guidance Note refers to relevant EU legislation on non-discrimination and makes the case for ensuring that minorities are protected, it fails to identify how potential gender inequalities, such as unequal distribution of adverse impacts between men and women, are identified, assessed and managed during project preparation, and monitored during the implementation phase.

Gender integration in EU external financial assistance instruments (ENPI, DCI) outside of the European Union

In both the European Neighborhood and Partnership Instrument (ENPI) and the Development Cooperation Instrument (DCI), gender issues are important as Millennium Development Goal 3²⁰ - to “promote gender equality and empower women”. Gender is considered as one of the cross-cutting issues like human rights, development of democratic institutions, good governance, and environmental protection, that should be taken into account at all stages of aid programming.

In theory, gender issues should be identified in the EC Country Strategy Paper (CSP) and a thorough assessment of the political, social and economic situation, analysis of the country’s achievements and constraints with respect to mainstreaming gender equality, gender analysis and should be included in the EC response strategy.

The CSP findings should be reflected in National Indicative Programmes (NIPs) through “specific objectives and expected results for each area of cooperation, following the principle that objectives define linkage to gender equality policies, and results reflect equal benefits to women and men. Main performance and outcome indicators need to be disaggregated by sex. Whether gender equality has been included in all areas of the NIP rather than as a separate section is always a good pointer for gender mainstreaming.”²¹

To ensure gender mainstreaming EC staff are recommended to employ a number of tools (gender appraisal, beneficiary assessment, etc) for looking at gender issues and gender budgeting. Depending on the country context these issues should be examined to varying degrees in the formulation of the budget support programme and gender issues should be taken into account in the choice of performance criteria and indicators for the disbursement of tranches.²²

Gender related IFI policies and standards

The checklist below should support the assessment of whether women and men are being given equal opportunities in planning, implementation and evaluation of projects and programmes. It examines whether equal opportunities exist in terms of participation in decision-making and how the development of the project/programme impacts on gender relations in the given society.

The questions are samples, so it is not required to answer all of them, but it can help to obtain a clear picture regarding the gender profile of the proposed activity. The checklist is divided into two parts: the general list that can be applied to any project/programme, and the second sector-specific.

Checklist for projects/programmes (for all IFIs²³) in the preparation and implementation phase

Analysis of Project/Programme related documents	Yes	No
Does the project/programme comply with national and international human rights laws?		
Do the available documents from the institution include a Country Gender Analysis ? (analysing gender relations, dynamics and inequalities within the relevant political, legal, geographic, economic, historical and/or social contexts to be considered throughout the project cycle)		
Does the project/programme documentation contain a Gender Inequality Assessment?		
Does the project/programme documentation contain and analyse gender disaggregated data as a background/justification for the project's existence and design?		
Does the project/programme comply with the relevant social and environmental safeguard policies of the given IFI/EU programme?		
Do the project/programme's major goals refer to women and men, their existing roles and responsibilities, and are gender inequities addressed by the specific objective?		
Does clear evidence and careful analysis exist where gender neutral objectives are chosen?		
Are the varying needs and priorities of women and men taken into account in the activities undertaken in response to the specific objective? (including rural, urban communities specification)		
Have appropriate activities been formulated to reach both women and men as part of the goals of the project/programme? In the case of harder to reach women (rural areas, cultural circumstances), has particular attention been paid to designing activities to reach women?		
Are the existing gender roles and responsibilities affected by the involvement of both women and men in the planned activities?		

Do the specific objectives and the planned activities address relevant gender inequalities in women's and men's roles and responsibilities?		
Does the project/programme identify immediate impacts or benefit and longer term outcomes for both women and men?		
Does the project/programme identify the longer term impacts of so-called gender-neutral objectives?		
Have possible unplanned effects and outcomes that might be negative for women or men been anticipated and addressed?		
Have quantitative and qualitative gender sensitive indicators to measure the long term impact or benefit been developed?		
Are quantitative and qualitative gender sensitive indicators in place to measure the participation of women and men at each stage of the planned activities?		
Have gender-disaggregated, measurable indicators been developed to establish whether both women and men will be part of planned activities (beneficiaries, employees etc)?		
Do project/programme documents describe potential remedies in case of violations of gender, social and environmental rights (Ombudsman, grievance mechanism, IFI redress mechanisms)?		
Has the project team identified best practices and tried to incorporate them into the project documentation?		

Analysis of the project preparation and public participation stage	Yes	No
Have changes in the project design been proposed based on the results of the consultations?		

Project Monitoring /Evaluation	Yes	No
Does the project team follow a list of gender-sensitive indicators for monitoring/evaluation purposes?		
Are project/programme implementation/monitoring reports available for all stakeholders, including vulnerable groups, women/men?		
Does the project/programme implementation team discuss monitoring reports with vulnerable groups, women/men?		
Does the project/programme implementation team follow issues raised by vulnerable groups, women/men?		
Does the project/programme evaluate the status of gender sensitive indicators after the completion of the project/programme?		

Sectoral and cross-sectoral checklists on gender mainstreaming

The checklist below is designed to help activists to identify sector-specific problems related to gender, and particular issues that need to be taken into account.

Corporate level (cross-sector)	Yes	No
Does the company have a gender policy?		
Does the company have a sexual harassment policy?		

Has the staff taken part in any gender training?		
Is there training tailored and specialised to help women's promotion to higher level (management) jobs or to more technical areas of work, in order to address prevailing gender imbalances?		
Is there a balanced representation of men and women in senior management?		
Is there a balanced representation of men and women at all levels of staffing?		
Are men and women paid equally for comparable positions and tasks that require similar qualifications?		
Are hiring committees gender balanced?		
In case of downsizing of company operations, are women and men regarded equally? Or are proportionally more women retrenched than men?		
Are workers free to form trade unions? Are women represented in trade unions and health and safety committees?		

Resettlement (cross-sector)	Yes	No
Is the consultation phase organised fairly for men, women and vulnerable groups, at suitable times, venues etc?		
Is there (going to be) any compensation for economic displacement or the loss of livelihood, for example following lost access to resources or formal/informal work? Is the compensation (going to be) equal for both men and women?		
Are there (going to be) consultations with women and men from the host communities about the relocation of displaced people near their homes/property?		
Resettlement plan		
Is there (going to be) a resettlement action plan? Are female-headed households (going to be) represented and consulted in the preparation of this plan?		
Are women and men (going to be) given equal opportunities to training and education as part of the resettlement plan, thus helping them in finding new job opportunities at the new place?		
Are women and men (going to be) represented equally in monitoring the implementation of the resettlement plan?		
Are there female representatives of resettled groups to monitor and communicate on behalf of the group to project promoters, city/state authorities and IFIs?		
Is there (going to be) a person or institution responsible for dealing with general or gender problems, such as violence against women, women's difficulties with access to household necessities, unequal treatment in searching for new job etc.?		
New sites for relocation		
Have women from all socioeconomic groups seen and approved the proposed site for relocation?		
Are there different alternatives available for resettled people to choose between?		
Is the site's location (going to be) integrated/connected well with streets, under/over passes, street lighting, and other infrastructure?		
Is the site isolated, thus risking ghettoisation of the resettlement area?		

Are the local cultural conditions at the new site at least equal to the former site in relation to gender issues?		
Conditions at the new site		
Are there (going to be) adequate sanitation facilities at the new site?		
Are there (going to be) adequate living conditions at the new site, such as enough room for big families, affordable cooking and heating options?		
Are there (going to be) adequate environmental conditions at the new site? Are there any main polluters in the vicinity of the site, eg. heavy industry, large-scale agricultural industry, main transport corridors etc.?		

Construction (cross-sector)	Yes	No
Environmental degradation		
Is the construction (going to be) causing any harmful impact on the environment and local communities, eg. noise or dust pollution, destruction of valuable ecosystems, agricultural lands, water bodies and water sources etc.? Is this harm affecting men and women differently, eg. increasing the burden on women as primary carers and guardians of family health?		
Biodiversity and access to natural resources		
Is the construction (going to be) harmful for landscape and biodiversity protection? Is this (going to be) affecting women and men differently? Is it going to be harmful to local livelihoods, eg. on eco-tourism, sustainable harvesting of resources, such as berries, mushrooms, herbs? For example women may collect medicinal plants for securing their family's health or for extra income.		
Is the construction (expected to be) disrupting access of local communities to agricultural land or to natural resources, such as rivers, lakes, forests, pastures, which are important for provision of their food, water, fire wood, recreation, livelihood, income etc.?		
Disruption of social infrastructure and services		
Is the construction (going to be) causing any disruption in the communal services, such as electricity cuts, water regime or shortage, household waste collection, changes in public transport routes?		
Are these disruptions (going to be) impacting women more than men in the community?		
Are the disruptions (going to be) consulted with both men and women in the affected communities?		
Are the disrupted regimes of water and electricity availability, or the new schedules and routes of public transport (going to be) designed according to the different needs of men and women?		
Is the construction (going to) cause disrupted access by road, eg. for ambulances or fire brigades, or by pavement, eg. for mothers with babies or for disabled people?		
Are all necessary measures (going to be) taken to ensure that the disruptions will not last longer than necessary for the construction? This would require good planning and coordination among the responsible institutions, to ensure that the inconveniences caused to the affected people will not stretch over an unlimited period of time.		
Benefits and threats for families and community values		

Are women and men going to have equal opportunities for employment on the construction and related services?		
Is the construction development (going to be) widening the income gap between men and women?		
Is women's economic vulnerability (going to be) increased as a result of increased prices and the wider income gap?		
Are there (expected to be) an increase of family problems, such as extra burden for wives of workers on shifts or rotation workers? For example household duties, such as child care may be shared even less than usual. Additionally rotation workers can get isolated from their families, resulting sometimes in depression, alcohol or drug abuse, or "2nd wives".		
Is the construction boom (expected to be) threatening social cohesion and challenging communal values? For example increased income, predominantly for the male workforce, can cause an increase in gambling, prostitution, violence against women and children etc.		
Migrant workers		
Is the influx of often unaccompanied workers from other regions or countries impacting negatively the local social fabric? For example there may be an increase of crime, including sexual harassment, decreasing the sense of safety for local women, causing rise in trafficking of women and prostitution, rise in STDs etc. ²⁴		
Are migrant workers (going to be) provided with separate health services? Are local health services (going to be) stretched extra due to the influx of extra workers, thus decreasing their quality for the local community?		
Are local health services prepared to deal with new demand, eg. rise in STDs or appearance of locally new diseases brought in by migrant workers from far away places? For example for the construction of the LNG plant in Aniva bay on Sakhalin island workers came in from as far as Turkey and the Caspian region, the Philippines etc.		
Health and safety		
Will increased traffic pollution impacts will be mitigated adequately?		

Agriculture	Yes	No
Local communities, natural resources and biodiversity		
Are small scale farmers (going to be) impacted negatively by large scale agricultural production, eg. in terms of different terms for selling/buying or leasing land, and/or access to markets for their products?		
Are women entitled to land ownership and are they given an equal price for selling their land as men?		
Are there land ownership problems, eg. due to fall out of the collectives system and the lack of ownership documents for past owners or users of the land, which are (going to be) disproportionately affecting women?		
Are large scale agricultural producers (expected to be) in competition with local communities for land and/or water resources? Does this affect women more than men, eg. for providing food or additional income for their families through subsistence agriculture, fishing, collection of herbs, berries and mushrooms from the wild etc.?		
Labour and income		
Are women and men (going to be) paid equally for comparable jobs?		

Are seasonal workers (going to be) contracted according to labour code requirements?		
If seasonal migrant workers are (going to be) accommodated on the farm premises, are there adequate sanitary and living conditions? Is the cost of accommodation fair?		
Are investments, eg. in agricultural SMEs, (going to be) targeting male and female farmers in ways that promote equality?		
Are investments (going to be) targeted to promote equality with consideration of men's and women's respective roles, technical capacity, land-ownership patterns, access to technology and credit, extension services, and inputs?		
Health		
Are local farmers (going to be) protected from the risks of pollution – either chemical, i.e. spray drift or downstream water pollution from pesticides and fertilizers, or genetic pollution, i.e. from genetically modified organisms?		
Food processing and manufacturing		
Labour and income		
Is gender classification of work (expected to be) impacting the gender pay gap?		
Do job announcements mention gender requirements?		
Are men and women (going to be) given equal opportunities for training and gaining professional skills?		
Are women (going to be) represented in supervisory and management positions?		
Is the role of women as family carers taken into account in planning of individual shifts, breaks and holidays? Are mothers or other family carers allowed to take additional sick leave days, according to state and/or company policy?		
Are pregnant workers (going to be) given any flexibility in planning shifts, taking breaks, sick leave and holidays, as well as in task assignments that are less demanding, eg. no lifting?		
Are workers (going to be) free to organise in trade unions?		
Health and safety		
Are workers at out-of-town industrial premises (going to be) provided with public or company transport to their work place?		
Is this transport schedule accorded with shift times? Does it ensure safe and easy access to female workers?		
Are workers equipped with adequate garments and tools to be able to carry their work in a safe and more effective way?		
Are sanitary conditions on the premises adequate for the different needs of female and male workers?		
Retail centres, malls, business centres	Yes	No
Wider social impact		
Are informal traders (expected to be) impacted by new retail centres and malls?		

Is the access of women and poor people to local shops (expected to be) decreased?		
Is the livelihood of small shop owners (expected to be) impacted?		
Do (or will) women and poor people, who do not drive and/or own cars, have access to out-of-town retail centres and malls, eg. by public transport?		
Labour and income		
Is there gender differentiation of jobs at the malls and retail centres?		
Are women represented equally on all levels of management?		
Is the role of women as family carers taken into account in planning of individual shifts, breaks and holidays? Are mothers allowed to take additional sick leave days, according to state and/or company policy?		
Are pregnant workers given any flexibility in planning shifts, taking breaks, sick leave and holidays, as well as in task assignments that are less demanding, eg. no lifting?		
Are workers in the malls, retail and business centres free to organise in trade unions?		
Is there any gender favouritism when hiring new staff? (Are women less likely to be employed because they may become pregnant and go on maternity leave?)		
Health and safety		
Are workers at out-of-town retail centres, malls and business centres, (going to be) provided with public or company transport to their work place? Is this transport schedule designed according to shift times? Does it ensure safe and easy access for female workers?		
Are access routes to malls, retail and business centres, eg. from parking lots, (going to be) safe and accessible for women, mothers with children and the disabled? Are there designated parking spots for them, which are close to elevators and/or emergency exit routes? Are there adequate lighting, security personnel and/or other measures to address women's safety concerns?		
Are workers equipped with adequate garments and tools to be able to carry out their work in a safe and more effective way?		
Are sanitary conditions on the premises adequate for the different needs of female and male workers?		
Are there adequate facilities to change nappies for infants?		
Tourism Industry	Yes	No
Local community, natural resources and biodiversity		
Is the tourism development going to decrease the access of local people, and especially women, to natural resources, such as: agricultural land; hunting/fishing or collection of herbs, mushrooms and berries for family use or for earning additional income; recreational opportunities, such as hunting, fishing, swimming, hiking, cross-country skiing etc. Is this (going to be) impacting women and men differently?		
Are local communities (going to be) able to use the new tourism services?		
Have ways of maximising the benefits for the local communities been considered?		
Is the new tourism development (going to be) affecting the provision of electricity, water or other services to local communities?		

Is enhanced electricity, water, transport and other infrastructure (going to be) bringing benefits to local communities as well?		
Is the tourism development in line with other development priorities for the local area? Eg. is there competition for agricultural land, hydro power generation on local rivers etc.		
Are tourism development plans in line with biodiversity protection, eg. with management plans of protected areas? Are such management plans including measures for increased tourist stream due to new tourism industry development?		
Labour		
Are women equally represented at all levels of employment in the tourist industry?		
Are women paid equally to men for comparable jobs?		
Is the investment (going to be) supportive of female and male income-generating roles in running hotels and tourism related businesses, such as handicraft markets, and tour guiding?		
Are migrant women workers (going to be) employed? If yes, are they employed legally? Are they treated equally as other workers, eg. in terms of payment, overtime work, health/social insurances etc.?		
Are seasonal migrant workers (going to be) accommodated on premises that have adequate sanitary and living conditions? Is the cost of accommodation fair?		
Are workers free to organise in trade unions?		
Health		
Are there (going to be) additional health facilities planned/in place, to ensure that local health infrastructure will not be overloaded by the need to provide services to both local people and tourists?		
Are there (going to be) sufficient health and safety measures in place to protect workers in the tourism industry from occupational over-exposure to toxins, eg. from cleaning and washing products?		
Is prostitution a possible outcome of growth in the tourist sector?		
Is prostitution legal, and if so, are there (going to be) medical services and STDs prevention measures in place?		
Are employers and tourism boards (going to be) introducing measures to avoid the exploitation of women for prostitution, for example to avoid the use of stereotypical images in advertising and marketing materials that encourage sex tourism?		
Are hotel owners (going to be) taking measures to ensure that prostitution is not taking place on their premises?		
Are local health institutions measuring whether there is an increase in STDs?		
Municipal water, waste water and solid waste services		
Is the project/investment (going to be) consulted with both men and women, considering the different roles they have in fetching water, washing, cleaning and disposing of the household waste, as well as different vulnerability to diseases spread by poor sanitation?		
Is the project/investment (going to be) addressing the different needs of men and women with regards to the services, eg. when selecting routes for water infrastructure, or when placing new waste collection bins?		

Is the investment (going to be) shifting access to water from households to business and industry? Is this shift (going to be) impacting disproportionately the price of the service for the households?		
In cases when the investment includes placing new waste collection bins, is the distance from schools, kindergartens taken into account? What is (will be) children's access/ exposure to these bins?		
Has an analysis been carried out on the impacts caused by planned increases in bills, including the impact on female-headed households? Are appropriate mitigation measures in place? Does the authority have the capacity and interest to implement them?		
In cases of recycling or landfill rehabilitation projects, what compensation is foreseen for the economic displacement of informal waste pickers? Have men and women waste pickers been consulted about this?		

Urban transport	Yes	No
Does the project/programme support the development of low cost public transport schemes that would not increase the burden for economically vulnerable men and woman?		
Does the project/programme ensure easy commuting between the different parts of the city/country/province?		
Have routes and bus stop locations been consulted with women to ensure their access to public areas, such as schools, markets, parks?		
Are vehicles (going to be) equipped with designated seats and places for mothers with babies, disabled and old people?		
Is there (going to be) adequate lighting on bus stops and train stations, as well as on access routes to them, to ensure enhanced safety for women?		

Transport ²⁵	Yes	No
Are the investments in transport (going to be) increasing access to schools, health, local markets and other services?		
If the investment is into roads in a country with differential ownership of vehicles, i.e. where the majority of women do not drive, but use public transport or walk, are provisions (going to be) made for women's mobility on the route?		
Is the access to work and income of men and women (going to be) impacted by the project?		
Have the negative impacts of new transport routes - eg. noise, air and land pollution, as well as proximity to schools and other social infrastructure – been consulted with both men and women in the impacted communities?		
Are there (going to be) barriers and adequate signs and speed reduction measures near residential areas and schools, to prevent accidents?		
Are residential areas (going to be) protected with noise barriers?		
Are pedestrian crossings (going to be) suitable for mothers with babies, old or disabled people? Are underground pedestrian crossings (going to be) well lit and regularly cleaned? Are there any other measures provided to increase the safety of women and children, eg. security personnel?		
Are sidewalks (going to be) wide enough to allow women with babies to move freely?		

Are there (going to be) bike lanes and adequately wide pedestrian paths along newly constructed roads?		
Are there (going to be) alternative roads – eg. non-toll roads, or ones suitable for horse and carts and bikes – parallel to new roads, in order to secure access to agricultural property, to neighbouring settlements, to markets etc.?		

Power and Energy ²⁶	Yes	No
Are poor households in rural areas (going to be) connected to/ benefit from new electricity infrastructure?		
Are energy projects, eg. new high voltage transmission lines routes (going to be) consulted with both men and women in impacted communities?		
Are men and women normally working on agricultural land going to be compensated adequately when/if a new high voltage transmission line will pass above their land and limited working hours will be allowed?		
Are projects for unbundling power companies and privatising electricity generation and distribution (expected to) bringing additional economic burdens for poor women and men?		
Are energy rates (expected to be) increased? Is energy poverty (expected to be) increased as a result of the investment?		

Extractive Industries	Yes	No
Employment and livelihoods		
Is the extractive project (going to be) harmful for income generation and the livelihoods of local people, eg. livestock, fishing, agriculture, tourism?		
Is the extractive project (going to be) harmful for the historic or cultural heritage of the area?		
Are the expectations for employment among local people being met? Are women and men given equal opportunities for employment?		
Is a plan for the operations closure and rehabilitation (going to be) prepared, made public and consulted with all the stakeholders?		
Is the operations closure plan (going to be) proposing measures for compensations, alternative livelihoods, training and education in facilitation of finding new jobs for both men and women in the local community?		
Are all members of the community (going to be) equally informed about the hazards of closed extractive operations sites, such as mine shafts, explosives, radioactivity, hazardous waste, danger of rock-falls or cave-ins etc.?		
Is there any illegal mining on abandoned or closed-down mine sites?		
Company CSR		
Is the company (going to be) conducting any social programmes and investments with the impacted communities?		
Are these programmes (going to be) conceived and implemented with the active participation and input of local communities? Are women (going to be) equally represented in the consultations about these programmes? And in the decision-making bodies of these CSR funds?		
Are there (expected to be) cases of misappropriation of the CSR funds, eg. either for corruption or for 'greenwash' with unclear benefits for the community? Have appropriate measures been taken to avoid this?		

Are men and women benefiting equally from the CSR programmes? For example are CSR funds (going to be) funding local roads rehabilitation, benefiting predominantly men as road-works employees and owners of vehicles? Or are there activities targeting the improvement of social services – health, education, water and waste, sport and recreation - that have positive impacts on women, children and the elderly?		
Have all stakeholders and potentially affected communities been given sufficient information about the risks and the measures to be taken in cases of spills and disasters caused by accidents? For example women, elderly and disabled people, who are more bound to their home, may have less access to mainstream media or information announced in public places, resulting in a higher risk of exposure.		
Is there (going to be) a complaints office responsible for addressing public concerns about health problems or loss of livelihood, caused by such accidents, and the needs for compensation, clean up and recultivation?		
Is there (going to be) a fund set up for potential clean up and compensation? Are local people and women (going to be) represented in the body deciding on how the fund should be managed and disbursed? Do/will they have any voting/ vetoing power in the decision-making of this body?		
Are there (expected to be) any adverse effects on the health of people in the community especially in the case of women and children, eg. reproductive illness, stunted growth, respiratory illness, skin irritation, eye infections, etc.?		
Are there (going to be) regular health checks of the local community conducted by the government or the company? Or is the company checking only its predominantly male workers as a 'representative sample' of the population?		
Are regular checks of the quality of drinking water, air and soil, as well as public health (going to be) conducted? Are the results of these checks (going to be) publicly announced and accessible to both men and women?		

Forestry sector projects	Yes	No
Does the project envisage continuing the existing gender division regarding the forestry use and related activities? ²⁷		
Have seasonal, financial and social constraints regarding women's/men's participation in project activities been taken into account?		
How will the project affect the level of women's/men's involvement in traditional forestry activities?		
Does the project analyse the differences between men's and women's preferences? ²⁸		
Does the project envisage different topics, opportunities or problems defined for men and women in the forestry sector?		
What will be the project impact on income generation and employment from a gender perspective?		
If the project requires new skills, knowledge, introduction of new technologies/ methodologies, do women and men have equal opportunity to access that new knowledge?		
Are forms of work likely to be carried out by women included in the increased demand for paid labour (transplanters, weeders, nursery owners and workers, etc.)?		
Will the project impose an extra burden on women's workday or patterns of work? Will this benefit or disadvantage women?		
Does the project increase the access of economically vulnerable women/men to forestry products or make it inaccessible?		

Does project positively impact the traditional pattern of forest ownership?		
Does the project affect women's/men's traditional right to collect and use forest products?		
Does the project affect the women's and men's traditional source of incomes and employment opportunities?		
If the project introduces new plantation and reforestation work, does it affect access to community forests and the development of homestead forests?		
Does the project action plan address and mitigate all gender sensitive issues identified?		

Gender mainstreaming tools and methods

Gender mainstreaming is a generally accepted strategy for promoting gender equality. According to the UN Social and Economic Council “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”²⁹

As gender mainstreaming is an approach to achieve gender equality, it tries to ensure that gender perspectives and attention to gender equality are central to all activities – policy development, legislation, resource allocation, institutional set up, planning, implementation and monitoring of programmes and projects.

The term ‘gender’ refers to the social construction of female and male identity. It can be defined as ‘more than biological differences between men and women. It includes the ways in which those differences, whether real or perceived, have been valued, used and relied upon to classify women and men and to assign roles and expectations to them. The significance of this is that the lives and experiences of women and men, including their experience of the legal system, occur within complex sets of differing social and cultural expectations’.

A number of instruments and tools exist to ensure gender mainstreaming. Below we briefly describe some of them:

Sex-disaggregated data data that is cross-classified by sex, presenting information separately for women and men, boys and girls. Sex-disaggregated data reflect roles, real situations, and general conditions of women and men in every aspects of society. For instance, the literacy rate, education levels, business ownership, employment, wage differences, dependants, house and land ownership, loans and credit, and debts are all included.

These data should be used when deciding on budgets, during policy-making and planning projects, and also demonstrates whether women and men are included in the programme or project as agents/project staff, and as beneficiaries at all levels. The approach therefore allows for effective monitoring and evaluation.

Gender Analysis A gender analysis helps to frame questions about women and men’s roles and relations in order to avoid making assumptions who does what, when and why. The aim of such analysis is to formulate development interventions that are better targeted to meet both women’s and men’s needs and constraints. Gender analysis has been established as a basic requirement for mainstreaming.

Gender analysis identifies, analyses and informs action to address inequalities that arise from the different roles of women and men, or the unequal power relationships between them, and the consequences of these inequalities on their lives, their health and well-being. e.g. Gender analysis in the health sector - The way power is distributed in most societies means that women have less access to and control over resources to protect their health and are less likely to be involved in decision-making. Gender analysis in health therefore often highlights how inequalities disadvantage women’s health, the constraints women face to attain health care and ways to address and overcome these constraints. Gender analysis also reveals health risks and problems which men face as a result of the social construction of their roles.³⁰

Gender Audit analyses and evaluates policies, programmes and institutions in terms of how they apply gender related criteria. Gender Audits are crucial for ensuring that policies, legislation, allocations, taxation, strategies, programmes and projects adhere to the agreed global commitments to promote gender equality stipulated in international human rights instruments and standards.³¹

Gender audits analyze income and expenditures from a gender perspective, called the Gender Budget. The basic assumption of gender audits is that public policy impacts differently on men and women. This variance stems from the different roles of women and men in the family and from the lower economic status of women. The purpose of gender audits is to lead to changes in public policy that contribute to an increase in gender equality.³²

Gender Impact Assessment - (GIA) is the core tool for implementing gender mainstreaming. It helps to estimate the different effects (positive, negative or neutral) of any policy or activity implemented in terms of gender equality.

GIA should be carried out at an early stage in the policy decision-making process (before the approval and implementation of a Programme) so that the policy can be adapted or reoriented. This is especially true in case of neutral or negative effects, helping the decision-makers to choose between:

- alternative scenarios (derived from differing estimates of the gender outcomes of the actions to be launched)
- alternative programmes and projects
- alternative methodologies for carrying out the same Programme or Project.

The elements identified by the GIA can be also used at the end of the policy cycle, during ex-post evaluation, in order to make a comparison with the outcomes actually reached.³³

Gender-sensitive indicators³⁵

Gender-sensitive indicators are indicators disaggregated by sex, age and socio-economic background. The indicators are a tool to assess the progress of a particular development intervention towards achieving gender equality. Gender-sensitive indicators are constructed to compare the position of women and men at a point in time and over time, and therefore focus on gender gaps (ie. the gap between men and women, particularly based on their socially constructed roles). Gender-sensitive indicators should also facilitate comparison between different groups of women and be able to identify and assess whether equity is being achieved.³⁴

Therefore, they can be used to assess progress in achieving gender equality by measuring changes in the status of women and men over a period of time. The utilisation of gender-sensitive indicators allows for effective monitoring and evaluation of project or programme activities, which in turn will feed into more effective future planning and programme delivery. Indicators are quantitative or qualitative benchmarks used for measuring or assessing the achievement of objectives or results. They can assume the form of measurement, numbers, facts, opinions, or perceptions that illustrate a specific condition or situation measuring changes in that situation or condition over time.

Below we will demonstrate some gender sensitive indicators that could be proposed in order to measure and/or assess the gender situation, what are the trends and to find out the real impact of the project/programme in particular economic sectors. To be sure that gender sensitive indicators reflect the situation in your community, city, province and/or country, the indicators should be adapted to local socio-economic and cultural patterns.

Gender equality indicators³⁶

- Measure conditions or situations that affect men and women differently
- Signal changes in power relations between women and men over time
- Determine access, use and control of resources and distribution of costs and benefits
- Point out changes in living conditions and in the roles of women and men over time
- Provide important inputs for planning, implementation, and evaluation of field projects and broad programmes ranging from community livestock to watershed irrigation to national policies

These indicators help to understand equity between women and men in a given place - the whole world, a country, a region, a province or a community.

Gender equity indicators (sample sectoral examples)

Forestry

- Increased number of women that benefit from natural resource concessions.
- Female ownership or co-ownership of equipment and tools for production, processing, commercialisation and other services associated with natural resources.
- Increased female participation in project management training programmes related to productive and conservation activities.
- Whether women and men consider that the operating plan of co-management responds to their needs and interests.
- Number of forest management plans with gender-sensitive activities (e.g., non-timber forest products, medicinal plants, wild crafts).

Urban

- Numbers of households headed by men, women, or couples connected to sewer systems and drinking water systems.
- Number/percentage of female-headed households receiving housing-related loans.
- Number of women trained in household maintenance skills.
- Increased number of women with voting rights in community consultation processes for urban planning.
- Number/percentage of women in municipal institutions with environmental decision-making authority

Energy

- Reduction in the amount of time or money spent by women and men to obtain energy supplies (fuelwood, charcoal).
- Increased number of girls attending school.
- Amount of time spent by women on rest, relaxation and learning activities.
- Number/percentage of women and men adopting energy-saving technologies.
- Number/percentage of women and men involved in energy-related employment and training.
- Number/percentage of women and men involved in energy policy dialogue.
- Reductions in the number/percentage of women and children visiting clinics for respiratory or eye conditions.
- Number/percentage of women trained to use alternative technologies.

Resources

Gender toolkits and other useful literature for campaigners:

- Gender Toolkit for International Finance Watchers, http://www.genderaction.org/publications/IFI-Watcher_Toolkit.pdf
- Essential Gender Analysis Checklist, <http://www.genderaction.org/publications/11/checklist.html>
- Gender Action Toolkit for International IFI watchers, <http://genderaction.org/>

- images/2009Sept_IFI-Watcher%20Toolkit_AR.pdf
- Gender Action, Gender Justice, http://genderaction.org/images/Gender%20Justice_Final%20LowRes_2007.pdf
- A Toolkit for Chinese Civil Society Organizations, http://www.boell-china.org/downloads/Gender_Audit_Toolkit.pdf
- Gender, Macroeconomics and the International Financial Institutions (interesting materials), <http://www.boell.org/web/135-311.html>
- Toolkit on Gender Mainstreaming in EC development cooperation http://www.iiav.nl/epublications/2004/toolkit_on_mainstreaming_gender_equality.pdf
- ADB - Gender Checklists and toolkit <http://www.adb.org/Gender/checklists.asp>

This includes checklists for the following sectors - Agriculture , Education, Health, Resettlement, Urban Development and Housing, Water Supply and Sanitation, as well as a Gender, Law, and Policy Toolkit, and Project Gender Action Plans: Lessons for Achieving Gender Equality and Poverty Reduction Results (A Briefing Note)

- Forum on ADB materials on Gender <http://forum-adb.org/russian/inner.php?sec=3&id=70>
- EBRD gender equality pages, with gender matrices (ie. checklists), <http://www.ebrd.com/russian/pages/about/principles/gender.shtml>

Other

- Gender Impact Assessment by RIMM, http://www.rimmrights.org/Documents/RIMM_GIAs.pdf
- Intersectionality: A Tool for Gender and Economic Justice, August 2004, www.awid.org
- Gender Mainstreaming in Practice: A Toolkit, UNDP, <http://europeandcis.undp.org/home/show/6D8DE77F-F203-1EE9-B2E5652990E8B4B9>
- Gender in Development Cooperation 2009, VENRO (available <http://www.womnet.eu/>)

Glossary of terms

Gender The social differences and relations between men and women that are learned, changeable over time, and have wide variations both within and between societies and cultures. These differences and relationships are socially constructed and learned through socialization processes in families, schools, faith communities and other societal institutions.

Gender analysis Gender analysis is a systematic way of looking at the different impacts of development, policies, programmes and legislation on women and men that entails, first and foremost, collecting sex-disaggregated data and gender-sensitive information about the population concerned. Gender analysis can also include the examination of the multiple ways in which women and men, as social actors, engage in strategies to transform existing roles, relationships, and processes in their own interest and in the interest of others.

Gender equality The concept that all human beings – men and women, boys and girls – are free to develop their personal abilities and make choices without limitations set by stereotypes, rigid gender roles and prejudices. Gender equality means that the different behaviour, aspirations and needs of women and men are considered, valued and favored equally. It does not mean that women and men have to become the same, but that their rights, responsibilities and opportunities will not depend on whether they are born male or female.

Gender equity Gender equity means fairness of treatment for women and men, according to their respective needs. This may include equal treatment or treatment that is different but considered equivalent in terms of rights, benefits, obligations and opportunities. In the development context, a gender equity goal often requires built-in measures to compensate for the historical and social disadvantages of women. Thus, gender equity often entails women's empowerment.

Gender integration Involves identifying and then addressing gender differences and inequalities during programme and project design, implementation, monitoring and evaluation.

Gender mainstreaming 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.

Gender sensitive Policies, laws, projects and organizations that actively recognize and identify individuals as gendered beings who are constrained in different and often unequal ways. They analyze and address the differing and often conflicting needs, interests and priorities between men and women, boys and girls.

Gender disaggregated data Statistics and data gathered and broken down by sex in order to aid comparison.

Sex: Sex refers to the biological characteristics which define humans as female or male. These sets of biological characteristics are not mutually exclusive as there are individuals who possess both. Thus, the notion of only two biological sexes is to some extent a social construction.

Literature

- Gender in Development Cooperation 2009, VENRO
- EU Gender Politics in an International Context – Gender Perspectives and Gender Indicators, Conference Report, Findings and Policy Recommendations from the international WOMNET conference, Berlin, 2009

Annex 1 IFI project documentation

International Financial Institution	Project/program	Available documents	Accessibility	When
World Bank	Investment loan /Sector loan	<p>1. project information document</p> <p>Factual Technical Documents (this list is not definitive and may include other documents): prefeasibility studies feasibility studies, including cost/benefit analyses site and soil investigations detailed design studies financial statements of the agencies responsible for implementing the project a description of the institutional framework technical studies which support the environmental impact analysis project-related poverty analysis Environmental and Social Impact Assessment,</p>	<p>Website, www.worldbank.org \, Infoshop ,</p> <p>Usually available routine way</p>	<p>As soon as project enters World Bank pipeline</p> <p>Thus citizens must request Project or Sector Loan Documents containing "factual technical information" directly from the Task Team Leader or Country Director</p>
		<p>The final loan proposal, written for the Board of Executive Directors detailed description of the loan includes summaries of environmental and social impacts and mitigation plans for some loans Staff Appraisal Reports</p>	Before board	
	Loan and credit agreements			<p>re the legal agreements between the World Bank and a borrowing country on a specific project or sector loan. Loan Agreements pertain to loans financed by the International Bank for Reconstruction and Development (IBRD). Credit Agreements pertain to credits financed by the International Development Association (IDA). Again, these documents are typically written in English.</p> <p>WHEN: Loan and credit agreements ostensibly become public documents after the Board approves a loan or credit.</p> <p>WHERE: Loan and credit agreements should be available from the Bank's Infoshop. Send a request, including the project name or project number to the Infoshop, which will then contact the Bank's Country Department lawyer to get approval to release the document.</p>

International Financial Institution	Project/ program	Available documents	Accessibility	When
		Country Assistance Strategies, Project Appraisal Documents, and Program documents		<p>may be made publicly available before the Board has considered them provided that the client has given its written consent (e.g. during negotiations) to such early disclosure.</p> <p>Operational policy papers and sector strategy papers may be simultaneously disclosed if they have had public consultations and Executive Directors (EDs) have already reviewed a draft version of the paper (e.g. during consideration by a Board Committee). If EDs have not previously reviewed the paper, it may still be made available before Board discussion if the Board approves such early disclosure.</p> <p>After Board discussion, the final version of these documents are posted in Documents & Reports and the initial version will be retired from this list but available upon request.</p>
IFC	Investment Project	Summary of Proposed Investment (SPI), a short description of all proposed projects. Environmental and Social Review Summary (ESRS), for projects with adverse environmental and social risks.	www.ifc.org	SPI and ESRS documents are disclosed a minimum of 60 days for high-risk projects (Category A projects) and 30-days for all other projects before project approval by the IFC's Board of Directors.
		Social and Environmental Assessment (SEA), considers the relevant social and environmental risks of the project Action Plan (AP), the legally binding social and environmental mitigation measures that must be implemented by the borrower Annual Reports on the AP, updating the public on implementation of the AP	IFC requires that the project sponsor (the company to which IFC is providing financing), make the following publicly available:	See above
EBRD	Investment Project	Project Summary document Environmental and Social Impact Assessment (ESIA)	www.ebrd.com	PSD and ESIA documents should be available at least 60 days before of board day in case of private project and 120 days before in case of public project
EU	ENPI, DCI programming cycle	Social Compensation Framework Public Consultations and Disclosure Plan (PCDP) Environmental and Social Action Plan (ESAP)	Should be disclosed by project sponsor	
EU	ENPI, DCI programming cycle	Country Strategy Paper National Indicative program Annual Action Fiche Project Action Fiche	Relevant delegation web-site, EEAS web page, www.enpi-info.eu	Drafts of CSP and NIP should be available for commenting, AAF, PAF after approval
EIB	Investment loan			

Annex 2 Gender-related policies standards and redress mechanisms

International financial institution	Available policies/ Strategies/ Action plans	Links	Applicability	Available redress mechanism
World Bank	Operational policy 4.20 Gender and development	http://web.worldbank.org/WBSITE/EXTERNAL/PROJECTS/EXTPOLICIES/EXTOPMANUAL/0,,contentMDK:20064559~menuPK:64701637~pagePK:64709096~piPK:64709108~theSitePK:502184,00.html	Investment loans	World Bank Inspection Panel - is independent body to Investment projects, as well as the programs, like structural adjustment loans in case of violation of Bank's operational guidelines could be brought for revision for inspection panel. While Gender and development policy applies only to investment loans, the gender related discriminatory problems in SAP could be submitted under the safeguard policy violations.
	Bank procedures 4.20 Gender and development	http://web.worldbank.org/WBSITE/EXTERNAL/PROJECTS/EXTPOLICIES/EXTOPMANUAL/0,,contentMDK:20140815~menuPK:64701637~pagePK:64709096~piPK:64709108~theSitePK:502184,00.html	Investment loans	
	Gender strategy	http://web.worldbank.org/WBSITE/EXTERNAL/TOPICS/EXTGENDER/0,,contentMDK:20175863~isCURL:Y~menuPK:489593~pagePK:210058~theSitePK:336868,00.html	Investment loans	
	Gender Action Plan 2007-2013	http://siteresources.worldbank.org/INTGENDER/Resources/336003-1241561860207/GAPtransitionplan_may25.pdf	This transition plan identifies key lessons from the implementation of the Bank Group action plan, Gender Equality as Smart Economics, and sets out a proposal to improve the performance on Gender and Development, particularly in the economic sectors. It covers World Bank Group (WBG) operations from calendar years 2011 to 2013	

International financial institution	Available policies/ Strategies/ Action plans	Links	Applicability	Available redress mechanism
IFC	Policy on Social and Environmental Sustainability, Performance Standard 1,	http://www.ifc.org/ifcext/sustainability.nsf/AttachmentsByTitle/pol_	Applicable for all investment projects	IFC Ombudsman
	Guidance Note	http://www.ifc.org/ifcext/sustainability.nsf/AttachmentsByTitle/pol_GuidanceNote2007_full/\$FILE/2007+Updated+Guidance+Notes_full.pdf		
EBRD	EBRD's Environmental and Social Policy	http://www.ebrd.com/downloads/about/sustainability/2008policy.pdf	Investment projects	
	Gender Action Plan	http://www.ebrd.com/pages/about/principles/gender/plan.shtml	<ol style="list-style-type: none"> 1. Gender mainstreaming through strengthen the project appraisal processes and reinforce the Performance Requirements (PRs) proposed by the Environmental and Social Policy with relation to gender 2. Investigate three pilot countries (Georgia, Romania, Kyrgystan) to map and assess the impacts of the EBRD's investments and develop tools to produce reliable base-line studies. 	<p>Project compliance Mechanism</p> <p>In case of violation of Environmental and Social policy , the claims could be submitted to PCM. Two types of claims could be submitted seeking compliance and seeking mediation.</p>
ADB	Policy on Gender and Development	http://www.adb.org/documents/policies/gender/default.asp?p=gender		

End notes

1. Dennis and Zuckerman, Gender Action. December 2006. Gender Guide to World Bank and IMF Policy-based lending. Cited in http://genderaction.org/images/2009Sept_IFI-Watcher%20Toolkit_AR.pdf
2. Bloom Time Blues - big oil's gender impacts in Azerbaijan, Georgia and Sakhalin, CEE Bankwatch Network/Gender Action, September 2006, www.bankwatch.org. While the EBRD did not in the end support the Sakhalin II project, similar problems may occur in other extractive industry projects.
3. Mine Closure and its Impact on the Community: Five Years After Mine Closure in Romania, Russia and Ukraine, Michael Haney, Maria Shkaratan, www.worldbank.org, 2003
4. <http://web.worldbank.org/WBSITE/EXTERNAL/PROJECTS/EXTPOLICIES/EXTOPMANUAL/0,,contentMDK:20064559~menuPK:4564185~pagePK:64709096~piPK:64709108~theSitePK:502184,00.html>
5. Programme or policy based loans includes structural or sectoral adjustment programmes, for more information please visit <http://www.bicusa.org/en/Article.302.aspx>
6. Critique of the World Bank's Applying Gender Action Plan Lessons: A Three-Year Road Map for Gender Mainstreaming (2011-2013), Elizabeth Arend, Gender Action , October 2010
7. <http://go.worldbank.org/CQCTMSFI40>
8. Critique of the World Bank's Applying Gender Action Plan Lessons: A Three-Year Road Map for Gender Mainstreaming (2011-2013), Elizabeth Arend, Gender Action , October 2010
9. http://www.genderaction.org/images/Gender%20Justice_Final%20LowRes_2007.pdf
10. IFC must demonstrate its commitment to respect human rights - Joint Civil Society Statement on IFC's Draft Sustainability Framework, March 2011, http://www.accountabilityproject.org/downloads/Joint_Statement_HR_IFC_March_2011.pdf
11. EBRD Environmental and Social Policy (2008); <http://www.ebrd.com/pages/about/principles/sustainability/policy.shtml>
12. EBRD Gender Action Plan (2010); <http://www.ebrd.com/pages/about/principles/gender/plan.shtml>
13. The European Consensus on Development http://ec.europa.eu/europeaid/what/development-policies/european-consensus/index_en.htm
14. Millenium Development Goals - <http://www.un.org/millenniumgoals/>
15. The United Nations convened the Fourth World Conference on Women on 4-15 September 1995 in Beijing, China. Delegates prepared a Declaration and Platform for Action that aimed at achieving greater equality and opportunity for women. The three previous World Conferences were in Mexico City (International Women's Year, 1975), Copenhagen (1980) and Nairobi (1985). The outcome of the Beijing Conference is an agenda for women's empowerment. It deals with removing the obstacles to women's public participation in all spheres of public and private life through a full and equal share in economic, social, cultural and political decision-making. The Platform for Action sets out a number of actions – the responsibility for which lays mainly with governments, but also of institutions in the public, private and non-governmental sectors at the community, national, subregional, regional and international levels.
16. The United Nations coordinated an International Conference on Population and Development in Cairo, Egypt from 5–13 September 1994. The conference delegates achieved consensus on the following four qualitative and quantitative goals: 1) Universal education 2) Reduction of infant and child mortality: 3) Reduction of maternal mortality 4) Access to reproductive and sexual health services including family planning. Services addressing HIV/AIDS, breast cancer, infertility, and delivery should be made available and female genital mutilation actively discouraged.
17. Article 2, paragraph 2 (I), Regulation (EC) No 1638/2006 of the European Parliament and of the Council of 24 October 2006 laying down general provisions establishing a European Neighbourhood and Partnership Instrument
18. http://www.womec.org/womec/index.php?option=com_content&task=view&id=86&Itemid=1
19. Gender in Development Cooperation 2009, <http://www.womnet.eu/files/pdf/>

- Internationales/Gender%20in%20der%20EZ/Venro%20Headbook%20on%20Gender%202009%20(engl).pdf
20. Adopted by world leaders in 2000 and due to be achieved by 2015, the Millennium Development Goals (MDGs) provide concrete, numerical benchmarks for tackling extreme poverty in its many dimensions. The MDGs also provide a framework for the entire international community to work together towards a common end – making sure that human development reaches everyone, everywhere.
 21. Toolkit on Mainstreaming Gender Equality in EC Development Cooperation, <http://ec.europa.eu/europeaid/sp/gender-toolkit/>
 22. The Commission has established a Gender Help Desk, consisting of three gender specialists who are available to provide a tailor-made response to support EC staff in their efforts to implement gender mainstreaming comprehensively into development policies. Email: eu-gender@itcilo.org
 23. A list of the available project documentation can be seen in Annex 2.
 24. For example see CEE Bankwatch Network/Gender Action: Boom Time Blues: big oil's gender impacts in Azerbaijan, Georgia and Sakhalin, 2006 <http://www.genderaction.org/images/boomtimeblues.pdf>
 25. See also the separate section above on construction
 26. See also separate section above on construction
 27. E.g. in some countries women are responsible for collecting all types of forestry products, including fuelwood, while in other countries men are responsible for fuelwood, and women for non-timber products
 28. For example tree species
 29. United Nations "Report of the Economic and Social Council for 1997". A/52/3.18 September 1997
 30. Gender analysis in Health, <http://www.who.int/gender/documents/en/Gender.analysis.pdf>
 31. Gender Action has developed specific guidelines on how to use gender audits in IFIs funded projects <http://www.genderaction.org/images/Gender%20Action-ChinaToolkitweb.pdf> http://www.brookings.edu/papers/2005/05globaleconomics_moser.aspx
 32. What is a Gender Audit?, Barbara Swirski, August 2002 , <http://www.internationalbudget.org/>
 33. http://ec.europa.eu/regional_policy/sources/docgener/evaluation/evalsed/sourcebooks/method_techniques/conducting_impact_assessments/gender/index_en.htm
 34. Abdool SN, Vissandjée B (2001). An Inventory of Conceptual Frameworks and Women's Health Indicators. Montreal: Centre of Excellence for Women's Health.
 35. Gender Indicators, Lorena Aguilar, <http://www.generoyambiente.org/arcangel2/documentos/409.pdf>
 36. Ibid.



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