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**APPROACH MEMO**

# **Survey of IFI experience in mainstreaming Gender**

May 2015

**EBRD EVALUATION DEPARTMENT**



**European Bank**  
for Reconstruction and Development

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## 1. Introduction

A survey of gender-focussed elements in private-sector oriented operations at other institutions is included as a knowledge product in the [Evaluation Department Work Programme for 2015](#).<sup>1</sup> This type of product is intended to be a short piece of work on a specific issue of relevance and interest to the Board, and one which could feed usefully into subsequent special studies or provide value on a stand-alone basis.

Rather than being a solely project-oriented survey, limited to private sector operations, it is proposed to focus the work programme item on a survey of international financial institutions (IFIs) experience in mainstreaming gender.<sup>2</sup> The reason, as described in the rationale section below; is that given that the Gender Strategy (as guided by BDS14-098/F) is currently being prepared, a paper which looks at the larger experience of other IFIs (and relevant organisations) in mainstreaming gender, as well as their experience with gender elements of private sector oriented operations would be directly relevant and, as confirmed by the Gender Team, useful as input. This forthcoming work will therefore be entitled a *Survey of IFI experience in mainstreaming gender*.

### 1.1 Gender at the EBRD

Building on the experience gained under the EBRD's Gender Action Plan 2009, the Strategic Gender Initiative (SGI) was approved in 2013.<sup>3</sup> The initiative seeks to promote gender equality and the empowerment of women in the Bank's investment and technical cooperation projects. The Bank's Gender Team is housed in the Environmental and Social Department and the initiative currently works through the Bank's Environmental and Social Policy (2014) from a mitigation perspective, and the transition mandate, via the inclusion methodology of July 2013. The SGI provides the framework for a focused approach to the consideration of gender in the EBRD's operations taking a business approach to tackling the constraints and obstacles that impede the efficient functioning of markets; supporting the provision of services to client groups that are not adequately reached; ensuring that capable entrepreneurs can access financing; and working with its clients to improve employment opportunities both in terms of access and career development. Activities focus on the provision of access to finance, access to services and access to employment. As at end- March 2015, there were 32 operations with a gender component or focus in the Bank's portfolio, mainly concentrated in the financial and municipal sectors in Turkey, SEMED, and central Asia.<sup>4</sup>

### 1.2 Rationale for the Survey

Under the requirement of the Medium Term Directions for EBRD and reflecting the increasing institutional momentum around gender post 2015 Millennium Development Goals, the Bank is preparing a Gender Strategy for the Promotion of Gender Equality.<sup>5</sup> As the first quarter of 2015 institutional performance report confirmed, SGI activities are all at relatively early stages of implementation, and therefore it is too early to discuss their performance and achievement of results in terms of contribution to outcomes.<sup>6</sup> With this in

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<sup>1</sup> Please refer to section 7 of the Evaluation Department Work Programme for 2015 for further details

<sup>2</sup> Mainstreaming is taken to mean "a set of specific, strategic approaches as well as technical and institutional processes" for achieving gender equality commitments- See more at: <http://www.unwomen.org/en/how-we-work/un-system-coordination/gender-mainstreaming#sthash.60lBs0Xu.dpuf>. Based on ECOSOC 1997

<sup>3</sup> The Gender Action Plan was developed in 2008-09 and adopted by ExCom in May 2009. The Plan builds on existing initiatives to promote gender equality and women's empowerment, such as preventing gender discrimination and promoting access to finance and entrepreneurship for women

<sup>4</sup> Institutional Performance Report: First Quarter 2015

<sup>5</sup> Medium Term Directions for EBRD

<sup>6</sup> Institutional Performance Report: First Quarter 2015

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mind, this piece of work will be a timely contribution to the development of the gender strategy. The survey of IFI experience in mainstreaming gender aims to build on and update existing research, give more focus than exists currently on areas most relevant to EBRD, as well as help address areas discussed by SP Com during its March 19<sup>th</sup> discussions with management. Moreover, since a full evaluation of SGI is envisaged in the near term, this piece of work will therefore also seek to effectively inform this future evaluation.

### **1.3 Nature of the survey**

This study is intended as a comparator review and as such, no conclusions or recommendations will be drawn as to EBRD approach to mainstreaming gender.

### **1.4 Other relevant analytical work**

For the purposes of defining the themes involved in mainstreaming gender, it is important to consult recent analytical work in the area. EvD will seek to consult existing research and in particular, evaluations of mainstreaming gender at IFIs. Among these, two important pieces of work to note from the past five years are (i) [2011 AfDB Evaluation Report](#) which synthesises gender evaluations conducted by donor agencies between 1990 and 2010, indicating challenges and good practices at an organisational level as well as future options for gender mainstreaming. The scope of this paper is partly based on issues raised by the AfDB paper; (ii) [2012 ECG Paper 5](#) on Lessons from Evaluations of Development Support of Selected Multilateral and Bilateral Agencies. The conclusions of this paper have been considered in developing the scope of this study and indeed, this study will seek in part to provide an update to these papers.

## **2. Scope and methodology**

### **2.1 Scope**

Purposeful selection of institutions to be the subject of this survey will take place based on their assessed relevance to the purpose of the study and resource constraints. Relevant stakeholders at a selection of institutions will be interviewed and/or surveyed. These institutions will represent different business models, geographic range, and private sector focus. Institutions proposed for field/virtual visits where the team will interview a range of key stakeholders, as well as through the questionnaire, are the following: ADB, AfDB, EIB, IADB, IFC as well as UN Women. This group includes both international financial institutions and UN Women, which has the oversight for gender mainstreaming in UN Agencies and will therefore provide valuable insights to the survey. Those institutions which are proposed to be surveyed via questionnaire only are: OECD, EU, ILO, NORAD, IFAD, USAID and DFID. Based on an initial assessment of the available documentation and interviews with the gender team, the following themes will be covered by the study:

#### *2.1.1 Institutional approach and policy framework*

Key issues for consideration:

- evolution of stated commitment and intention to contribute to global gender goals,
- institutional viewpoint on mainstreaming gender as is relevant to the institutional context,
- strategic direction and evolution of policy underpinning

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### *2.1.2 Organisational practice*

Key issues for consideration:

- action plans associated with the strategy/policy (for both public and private sector support)
- placement of gender function and associated authority
- experience in allocating resources for delivery (staffing specialisations/capacity building, placements, existence of champions, evolution)
- operational tracking and associated processes (at entry and exit)
- institutional accountability and reporting
- internal incentives
- donor partnerships

### *2.1.3 Gender at an operational level*

Key issues for consideration:

- products (investments, capacity building technical assistance, analytical work, policy dialogue, dissemination of learning and advocacy),
- main sectors,
- country prioritisation,
- focus within private sector oriented operations,
- systematic monitoring of results, reporting, results

### *2.1.4 Reflections on progress to date in mainstreaming gender*

Key issues for consideration:

- Duration of the mainstreaming process
- Required implementation action e.g. capacity building, advocacy etc.
- Future direction

## **2.2 Methods of data collection and sources of information**

This study will include desk work and interviews. In particular:

- background review of EBRD Board papers, SP Com and TC Com documentation
- structured interviews in EBRD HQ with important stakeholders (gender team, CSE, Strategy and Policy Coordination)
- literature document review and synthesis of relevant evaluation/analytical work conducted by other IFIs, relevant institutions and MDG Working Group on Gender
- questionnaire to gender teams in wider group of selected institutions
- structured interviews with relevant stakeholders at selected institutions

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## 2.3 Deliverables

The expected deliverables under this study are a main report and a summary report which will be reviewed and circulated to the participating IFIs, for their own use, as well as made publicly available via the EvD website.

## 2.4 Potential problems and limitations of the survey

First, there may be limited access to thorough and reliable data from other IFI due to institutional sensitivities. Therefore both a survey will be undertaken and field/virtual missions to select IFIs and it is hoped that through this triangulation we are able to build up a clear picture. The EBRD will also anonymise data for the public report, if requested by participants.

Second, timing may be an issue because this work is aimed to inform the gender strategy preparation and there is therefore a need for the timeline to be joined up with strategy. The team has therefore limited the study's scope and will work to a well-defined schedule to avoid any slippage.

## 3. Administrative arrangements

### 3.1 EvD team

The Evaluation Team tasked with completing this Study comprises Shireen El-Wahab and Beatriz Perez-Timmermans. In addition, EvD anticipates contracting an external peer reviewer to contribute technical expertise in gender and help widen network access.

### 3.2 Peer reviewers

Keith Leonard, EvD Deputy Chief Evaluator, will be the internal peer reviewer of this Study. The external peer reviewer will be contracted shortly after finalisation of this approach memo.

### 3.3 Timetable

Given that the gender strategy is planned for discussion at SP Com on October 8, the team aims to complete this work in mid- September.

Milestone	Date (by week)
Study starts	II May
Draft Approach Memo circulated to the gender team	II May
Approach memo finalised	I June
Consultant recruited	III June
Documentation review and write up complete	I July
Survey analysis complete	IV July
Field visits complete	II August
Draft circulated to internal peer reviewer	IV August
Final approved by Chief Evaluator	I September
Final distribution	II September

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### **3.4 Budget**

This Study is expected to require consultant and travel resources to cover an external peer reviewer, as well as minimal travel expenses for physical field visits. EvD estimates that this study will require a total budget of GBP 10,000.