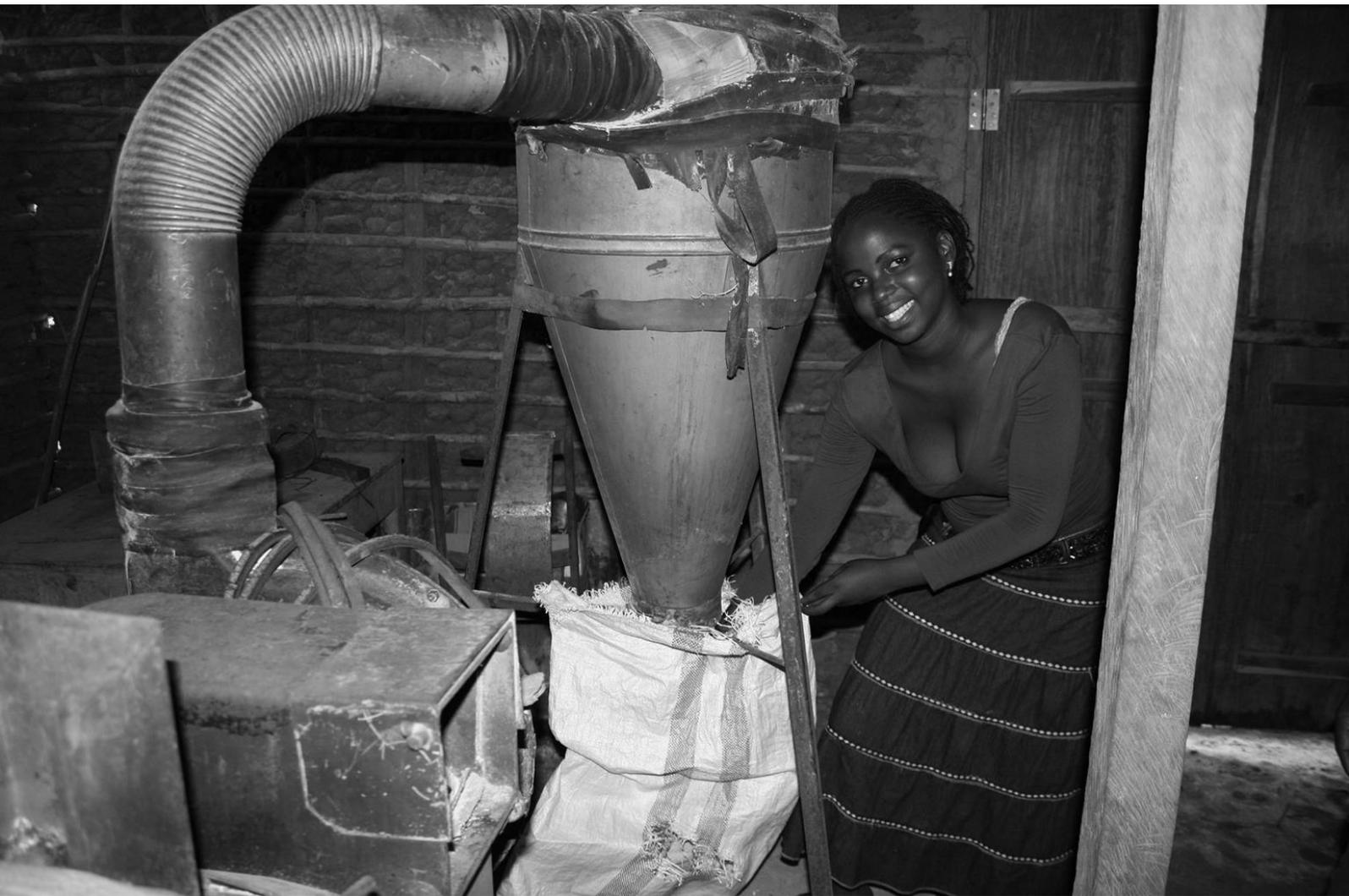


Mainstreaming Gender in the Energy Sector Trainer's Guide

Developed by:

Ministry of Energy Mozambique, Embassy of Norway in Mozambique, Norad
and ENERGIA International Network on Gender and Sustainable Energy



This training manual has been developed as part of the cooperation between the Royal Norwegian Embassy in Maputo and the Ministry of Energy of Mozambique, under the programme "Gender Mainstreaming in the Energy Sector in Mozambique".



REPÚBLICA DE MOÇAMBIQUE
MINISTÉRIO DA ENERGIA



ROYAL NORWEGIAN EMBASSY



Norad

ENERGIA
INTERNATIONAL NETWORK ON
GENDER AND SUSTAINABLE ENERGY

Preface

Energy is a basic need and a component of all productive processes. It is essential for development. Improved energy sources can improve levels of welfare, increase standards of living, and liberate people from darkness and isolation. The UN estimates that as of 2012 there are 1.4 billion people around the world that lack access to electricity, some 85% of them in rural areas, while 2.7 billion people use traditional forms of biomass fuels for heat and light and their own metabolic energy for mechanical tasks. In many places, woody biomass is hard to find and people switch to using poor quality biomass.

There have been many programmes and projects set up to try to change this situation and to introduce improved energy technology – in particular, to introduce renewable energy technologies, such as photovoltaic systems, and technologies which conserve fuel, such as efficient wood stoves. Other approaches have tried to increase biomass supplies, such as fuelwood lots. By no means have all of these programmes and projects been successful, and one of the contributing reasons is that they have mostly been planned with scant regard for gender aspects of the energy problem nor have they been implemented in a gender sensitive way, in other words there has been a lack of gender mainstreaming in energy policies of energy sector organisations. This manual is designed to support training of planners and programme managers in energy ministries, utilities and private sector companies involved in energy infrastructure project to increase their capacity to bring gender aspects of energy into the planning cycle. There is also a need to encourage gender specialists to increase their involvement in the energy sector. The manual is written in a way that does not require a technical knowledge of energy nor social science.

Three major target groups are envisaged:

- energy planners and project managers whose background is in technology but who recognize the need to address gender issues in their work and want to know how to do this
- general development planners, and particularly gender specialists, who recognize that energy may be a basic component of development, but who are not sure how to integrate this with other aspects of their work
- Gender Focal Points – increasingly organisations are appointing individuals to take responsibility for mainstreaming gender in their organisation and this manual gives ideas on how a focal point can achieve their goals.

The level of training assumes that trainees already have a professional education and some experience in the energy sector at the national level. Ideally training should be carried out by two trainers, one with a strong background in gender and the other with a good knowledge of energy technology for development. In our experience gender balance in the team helps to overcome the notion that “gender” means “women”.

The manual was developed as part of the Norad programme on gender and energy, initially for use in Mozambique and Liberia. We are pleased to say that the manual has been translated into Portuguese which we believe to be the first time that training material on gender and energy has appeared in Portuguese.

The manual is intended to provide materials for a course, but the length of the course will depend on how it is arranged. To deliver all the material in a single integrated course takes four or five days. However, it is not necessary to present all the units together. The units can be given in full-day or half-day sessions spread out over several weeks. This approach has an advantage when the participants are from the public sector and their release for several consecutive days is problematic

due to work demands requiring attention in the office which can result in them missing components. It also allows time for participants to absorb many new ideas and formulate questions in response.

The training manual is written from the perspective of public and private energy sector organisations mainstreaming gender in energy policy which makes it rather unique since most gender training material tends to be written from the perspective of gender mainstreaming in energy projects. The manual is based on training material originally developed by Energia, including the Gender Face of Energy, Mainstreaming Gender in Energy Projects: A Practical Handbook and the ENERGIA Handbook for a Gender Audit of Draft National Energy Policy for Lesotho¹ as well as the Gender in Energy Training Pack prepared by the University of Twente. The manual does not use standard gender analysis tools, such as the Harvard Matrix, because based on experience these have not been very useful in the context of energy. Instead, Margaret Skutsch and Joy Clancy (University of Twente, The Netherlands) developed a set of tools specially to help the planner work through gender aspects of energy problems in a systematic manner.

The lead author of the training material is Joy Clancy who is a Senior Technical Advisor to Energia. She was ably assisted by Dorothy Lele, Rose Mensah, Chandi Mutubuki-Makuyana, and Gilda Moljane. The review by Elizabeth Cecelski, Senior Technical Advisor to Energia, is much appreciated. The participants in the training courses in Mozambique and Liberia are acknowledged for allowing taking part in testing the materials. Thanks are also due to Sheila Oparaocha, Energia's coordinator, who skilfully moved the process along. Last, but certainly by no means least, thanks are due to Kari Thorsen and the Gender Team at Norad for enthusiastically supporting the development of the training material.

Joy Clancy
August 2012

¹ These publications are all to be found on the ENERGIA website: www.energia.org

CONTENTS OF THE TRAINING MANUAL

The material in this trainer’s guide is designed to be used in conjunction with the manual for the training course Mainstreaming Gender in the Energy Sector. The trainer’s guide is in two parts: Part One explains how to use the manual and Part Two provides specific information related to delivering the units which make up the training manual Mainstreaming Gender in the Energy Sector.

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PART ONE

HOW TO USE THE MANUAL

An Explanatory Note for Trainers:

How to use the Manual

Introduction

This Trainers Guide accompanies the manual Mainstreaming Gender in the Energy Sector. The manual serves both as a reference guide for participants and a training resource. It is assumed that the Guide is to be used by an experienced trainer.

Target Group

The format of the manual

The manual is divided into a number of units dealing with different topics related to gender mainstreaming in the energy sector at the policy level. The time needed for a unit is indicated at the beginning of each unit; the time varies slightly but in general it is around two hours. Depending on the time available to deliver the training course and the basic knowledge of the participants, which can have been determined by a training needs assessment, the trainer should select those units which are most appropriate to meeting the participants' needs.

Each unit has a cover page which gives the aim(s), learning objectives, a suggested time schedule for the different elements, key concepts and ideas introduced in the unit and the topics covered. A unit consists of an explanation of the topic under discussion plus short case studies, discussion points and exercises. At the end of each unit there is a reference list which gives the full bibliographic details of sources that have been used in the preparation of the manual.

Discussion points are mostly based upon questions related to the text or a case-study. The cases are intended to provide real examples of points raised in the text.

There are also exercises which may help to deepen the participants understanding of the issues at hand as well as practicing some of the techniques and tools.

How to use the manual and the training guide

The first step is for the trainer to familiarise her/him-self with the contents of the manual and with the trainers guide. The trainers guide provides specific information related to delivering the units which make up the training manual.

The manual is generic, that is, the examples are drawn from throughout Africa and occasionally further afield. It is recommended that the trainer try to find data and examples from their own location, region or globally about the situation of women and men. This can be general data, such as number of female and male headed households, or specific to the energy sector such as who collects fuelwood and sex disaggregated employment statistics (national or organisational). The trainer should also look for other visual material such as videos which can be obtained from international agencies (often for free) or downloaded from the internet. The use of such material while stimulating

can be highly dependent on the facilities where the training is to be given for example being able to provide a firm electricity supply and good internet connectivity – so it is sensible not to be too reliant on such material.

The trainer should decide how and when to distribute the material presented in the manual in a manner that fits the trainer's approach. It is not essential to print out the entire manual. It could be distributed at the end of the course in hard-copy or copied to a CD or memory stick or even up loaded onto an internet site file hosting service (eg Dropbox).

Included in the trainer's guide for each unit, there is a short overview of the contents plus some suggestions about how to treat the material for that unit and any exercises. The trainer should choose which exercises she/he wants to use (depending partly on the time available) and copy the instructions for these exercises for the participants. It is not necessary to use all of discussion points, case studies and exercises.

The discussion points are intended to draw out participants' experiences and opinions. The trainer does not have to use the discussion points given but can supplement the text with their own questions to stimulate discussion that are more relevant to the national context or experiences of the group. The trainer's guide suggests some of the common responses as well as alternative approaches for dealing with the discussion points.

The participants will need a few minutes to read the case study text (they are often short enough to put on a single presentation slide). Depending on the type of case participants can then be asked for their reactions or to tell their own experiences related to the case, or give local examples of similar cases they know or provide alternative solutions for the problem presented.

Detailed instructions for the exercises are given in the trainers guide – although the manual also includes some instructions. The exercises are usually done in pairs or in small groups. Exercises often taken longer than planned and it is the trainers' discretion how to round the session off, for example, if time is short the trainer can ask one individual/ group to read their solution out in plenary and let other's react to this solution. The task of the trainer is to make sure the discussion leads to a conclusion. The trainers guide gives suggestions about the type of answer one can expect. However, the trainer should be aware that most exercises do not have only one answer since much depends on context.

Training methods

In terms of delivery a trainer will have to use his/ her own experience to adjust the general methods described below to the specific needs of each participant and the specific contexts of each course. In this section we offer some general suggestions which also helps to explain the philosophy underlying the course.

Our experience is that in 'gender and energy' training courses, the participants come from both sides: there will be some who know a lot about gender but very little about energy, and others who are energy experts but who do not understand the gender issues. We also think that mixed groups can be very stimulating and provide perhaps the best means of mutual learning. In particular when dividing the class into small discussion groups, be sure that they are as heterogeneous as possible.

In terms of trainers, we consider that a good training strategy is to have two types of trainers – gender trainers, and energy trainers (although both will need to have studied the training manual in detail before carrying out the course). Our experience is also that the best results are obtained when

both male and female trainers are present. Although most gender trainers are women, there are also male gender trainers, and this in itself can be an object lesson for many participants! Men are often better at convincing other men that gender mainstreaming is not a threatening issue and that men can also benefit from gender mainstreaming. Having more than one trainer is also a good strategy in terms of course delivery since each trainer will have their own style, pace etc which helps to keep participants engaged.

We would also recommend that the trainers are supported by a third person who can act as a 'runner' to solve all sorts of technical problems (eg doing photocopying) and liaise with the organisation providing the training facilities. The trainers should not be distracted by having to solve 'housekeeping issues'.

The course is designed from the perspective of the way that adults learn best: through their active involvement in the sessions. This is not only because sharing their own work experience is an important part of network building, but also because adults learn more efficiently and effectively when they can link the new material to their own situation and experiences. Trainers are therefore encouraged not to present too much of the manual material as a 'lecture' – although we realise that in some topics this cannot be totally avoided – when this occurs participants should be given plenty of opportunity to relate the new material to their own experiences.

Participants or invited speakers can give presentations about their organisation and experiences with working with women and men/gender issues/gender training in their agency can also add value to the training. Another way to encourage participant participation is to ask for volunteers to give a summary of the previous days training session. This should be first thing in the morning and should take no more than 10 minutes for each session. One person should be responsible for the morning and one for the afternoon sessions – then it is not too onerous a task and the participant does actually participate in the sessions and is not too busy taking notes for their own presentation. Encourage them not to be too verbatim but more to give a general impression about what has been learnt. These presentations can make a useful input to any reporting of the proceedings. The trainer can also use them to monitor if participants have understood the previous days training.

Field visits can help to put concepts and new skills into context. Half-day site visits should be scheduled as much as possible in the afternoons – people are thought to absorb new ideas better in the morning.

Energisers, when participants are beginning to "wilt" are also fun ways to get people motivated again. Again trainers usually have a good stock of these and it can be entertaining to ask participants to supply an energiser.

If it is a residential course then try to include some evening events such as a cultural evening and a communal meal.

The beginning and the closing

Introduction and meeting other participants

The training will start with a general introduction which should include:

Presentation of the trainers: who are they? what have they done? what is their expertise?

Introduction to the course: go through the time schedule; explain the working methods; explain the main concepts.

Introduction to the subject: why is it important? what are the participants going to learn?

Next, the participants will have the chance to meet each other. An experienced trainer will avoid the type of introduction where participants give a few facts about themselves. There are numerous ways to break the ice and get participants talking to each other – each trainer has their own tried and tested method – nevertheless we have included an idea for an ice breaker.

We do recommend that during the introduction participants are asked to write down on cards what the expectations of the course are. These can be pinned to the wall and can be reviewed from time to time during the course to see if any expectations have been met. The final review should be during the course evaluation.

Closure of course

At the very end of the course, the trainer will need to gather all the participants from the course one more time. In this meeting the following this can be done:

- Give participants a last chance to ask some questions;
 - Try to get a final thought about the contents of the course by using the notes made at the first meeting/session (have the participants learned what they want to learn? how do they look at their own experiences after the course?)
 - Let every participant give his or her best/ most interesting learning experience during the course.
- Also, this final meeting can be used to hand out evaluation forms, additional materials about the course, etc. A group photograph and a certificate of attendance are much appreciated at this point.

All too often participants return to the office after a training course and are not sure how to make use of their newly acquired knowledge and skills so we recommend that the last session also includes the development of a personal action. An example is included in the manual with instructions in the trainers guide.

Suggested schedule

If the entire course is to be given, it might follow the following schedule:

Day	hour	Morning (10:00 – 12:00) Topic	Afternoon (14:00-16:00) Topic
1	1 st	Introduction participants/programme	Basic Concepts of Gender and Energy
	2 nd	What is the role of a GFP?	Basic Concepts of Gender and Energy
2	1 st	What is Gender Mainstreaming?	Mapping the Gender and Energy Situation in our country
	2 nd	How will GM benefit my organisation?	Mapping the Gender and Energy Situation in our country
3	1 st	Engendering Energy Policy	Organisational Assessment
	2 nd	Engendering Energy Policy	Organisational Assessment
4	1 st	Gender Action Plan	Engendering your Own Organisation
	2 nd	Gender Action Plan	Re-entry Action Plan & Evaluation

PART TWO

TRAINERS GUIDE TO THE UNITS

TRAINER'S GUIDE TO THE UNITS

UNIT 1

What is gender?

This unit introduces the fundamental ideas about gender and energy. Which parts to cover and the level of detail will depend on the background of the participants. It is not necessary to include all the discussion points or do all the exercises. The trainer has to make a selection. People are far more aware of 'gender' than they were twenty years ago. However, there is still a lot of misunderstanding about what the concept entails.

The unit begins by explaining the difference between sex and gender. It introduces the concepts of gender roles, relations, and contracts.

Discussion points 1 and 2 can best be done in plenary and get participants thinking about the concepts. For people without any prior knowledge of gender concepts, it may take time to adjust to the ideas, since many people find them threatening in the beginning. Allow sufficient time for participants to express their feelings and let them debate together rather than taking the lead yourself in such discussions.

Gender is concept which has evolved within the medium of the English language. Participants find it challenging to put the concept into their own language and so discussion point 3 has been included to help with this challenge including explaining the concepts at the village level.

Discussion point 4 is stressing the point that gender is dynamic.

Discussion point 5 places the discussion in the context of the energy sector. This is an important point because it places a concept in a real situation that participants might find easier to relate to. They are also important issues returned to during the other units.

UNIT 2

Why is Gender Important in Energy Policy?

The unit begins by briefly describing the contribution of energy to development. Gender is used here around the roles women and men play in their families and communities with many of their tasks relying on their own physical effort. The term 'metabolic energy' is introduced – participants could be asked if this is taken into account in energy planning. The answer to which is likely to be 'no'. However, its substitution by modern energy could do much to lighten workloads particularly for women.

Discussion point 1 asks for examples of women's non-household energy needs. The idea here is to get participants thinking beyond stoves (important though these are). It is interesting to ask "what are men's energy needs?" since it is a question not usually posed. The answers should reveal that men's needs are generally well met by energy policy. The issue of urban energy is also raised which has not had as much attention in the past but increasing urbanisation is changing that. There is also a general assumption that the urban poor have access to energy services but evidence suggests otherwise.

The next section asserts that energy policy is gender blind. The trainer may need to clarify the difference between 'gender blind' and 'gender neutral' (see glossary). It is important that participants come to realise that 'gender blindness' does not mean gender neutral – because gender blindness generally means that projects are unintentionally biased in favour of men. This can be hard for people to acknowledge sometimes: if women are not specifically identified and their opinions specifically sought, things are done in the men's way because men are almost always the spokespeople and decision makers. This section can be addressed through discussion point 2 which asks participants to reflect on whether or not gender blindness exists in the energy sector in their own country and if so why. It may be helpful at this point if the trainer is able to supply copies of the national energy policy or statements from utilities and other energy agencies to help the discussion. There may be differences of opinion as to why policy is gender blind, so allow time for these to be explored. Possible answers are (1) because women's fuels (biomass) are not 'visible' in statistics (2) because biomass fuels are often gathered free of charge and are therefore not considered to be important. (3) because it never occurred to energy planners that women have different energy needs from men, and (4) deliberate discrimination against women.

The text offers more explanations and the trainer should be ready at the end of the discussion to suggest any that have been missed. The underlying problem is that usually energy policy is formulated from the supply side (large scale energy projects) which is one reason women/gender issues are missed. Taking a demand side approach – increasingly known as the energy services approach is considered a more comprehensive approach which will ensure that women/gender issues are addressed in the energy sector. Some factors lie within the control of the energy sector some not (such as the subjects women and men choose to study). Identifying which factors are under the control of the energy sector can give us entry points for gender mainstreaming.

Discussion point 3 leads on from discussion point 2 with the particular focus on women and national energy policy (again having copies to hand would be helpful).

The case study is from Botswana describing a typical policy making process. While it is not surprising the energy sector people didn't consider including gender, another important point is the lack of interest by the Women Affairs Department in engaging in energy policy – many such departments/ministries behave in a similar way. Participants can be asked if this represents their own experiences of policy making.

The section on 'Why should gender be taken into account in energy policy' could be started by the trainer asking the participants this question, and allowing them to come up with answers, before going through the text on this.

The unit finishes by exploring what we mean by a gender-aware energy policy. There is no standard definition however the text suggests three key elements. This can be a good brainstorming exercise in plenary. This is followed by different dimensions of gender in energy policy which needs to be presented by the trainer. This section is quite challenging but helps participants to develop a much more comprehensive gender-aware energy policy. It is supported by an exercise to complete a matrix. The participants need to be organised into groups. These can either be heterogeneous or based on organisations/departments. At least an hour is required for this exercise since it can take some time for the participants to understand what is required of them. There is an example of a completed matrix in the text.

This exercise could be returned to at a later stage (if this is a long training course) when the energy ministry decides to revise its policy to mainstream gender.

UNIT 3

Identifying Gender Needs and Gaps for Developing a Gender-Aware Energy Policy

This unit follows from Unit 2. Once we have decided energy policy is gender blind we need to set about changing the situation. The basis of policy formulation is data. Therefore this unit focuses on data collection and analysis. In hard copy it looks long (30 pages), however, it is mainly reference material which the participants will find useful on their return to office. The trainer can point this out.

The introduction sets out the reasons for sex-disaggregated data collection. It is important for the development of the Gender Action Plan which should be pointed out to the participants. The session can begin with discussion point 1 in which participants review the existing situation in respect of energy data available to ministries and utilities. Most countries conduct some form of Living Standards Measurement Surveys (LSMS) increasingly they are including questions related to energy – but these are not generally comprehensive enough for detailed energy planning and certainly very limited gender issues can be identified (eg ratio of female to male headed households with an electricity connection). This discussion can serve as an inventory about what data is available and who collects what and how.

Section 2 looks at methods for identifying gender needs and gaps in energy. It proposes qualitative data gathering techniques (which are outlined in an appendix to the unit) as a lower-cost alternative to questionnaire based approaches for identifying gender energy needs and priorities. Two tools for understanding the issues, including their causes and effects, are introduced in Figures 1 and 2. The trainer could use these to develop an exercise by selecting a familiar energy sector problem (eg poor uptake of smokeless stoves) and asking participants to suggest causes and effects.

The sub-section on data analysis introduces two familiar gender analytical frameworks: triple role and practical needs and strategic interests. The group can be asked if they have met these before but then they should be introduced and discussed in the context of the energy sector. Participants should be asked to suggest energy services that could help women and men with their triple roles as well as meeting practical and strategic interests. It should be pointed out that in ENERGIA's experience that in the context of energy it is more helpful to consider three sets of needs or interests: practical needs, productive needs and strategic interests.

Discussion point 2 asks about who does what in terms of the triple role. The answers here are context specific and are mediated by social class and location. In some groups men may take the main responsibility for fuel wood collection whereas in many groups it is women's primary task. The lesson here is to be open-minded and be prepared to be surprised even about your own country!

Discussion point 3 links to the other framework and focuses on strategic needs. There is some question about whether or not energy directly helps with women's strategic needs. One of the frequently cited examples (although there is little evidence to support the point) is that street lighting allows women to go out at night to attend meetings. However, it can take more than the appearance of an energy service to change attitudes and feelings about going out after dark.

The case in Box 1 (the Mali multifunctional platform) is about very unusual approach to mechanisation, which also addresses gender needs, and most participants will be fascinated by the approach adopted. A short video is available on the platform at: www.trickleup.org/Mali. The participants can ask for their reactions to this type of approach: would it work in their own country? They could also be asked which needs or interests the project meets.

Table 1 shows how different energy forms can meet different needs and interests of women. The participants could be provided with an empty template and asked to make suggestions to complete the cells. They can add more energy forms.

The unit concludes with two gender analytical tools for policy content and at the planning/-implementation level. Table 2 lists policy issues and suggests a check list of questions related to gender issues. These are not exhaustive which should be pointed out to participants. They can develop their own when mainstreaming gender into energy policy. There is an exercise using the quick scan tool for a gender analysis of energy policy documents. A short extract is given from an African country's energy policy. Alternatively, the trainer can also use their own country's energy policy. The assignment should be done in small groups allowing 30 minutes for the review with answers presented in plenary.

UNIT 4

Social and Gender Issues in Energy Infrastructure, Petroleum and Mining

This unit should only be considered for inclusion in countries where there are large-scale electric power, upstream petroleum and mining projects.

This unit covers the key gender issues in upstream petroleum, mining, and power infrastructure development. It is especially relevant to the work of environmental agencies and environmental units in utilities. All GFPs should understand its importance, but the complete details can be given only to those involved in these areas, including CSOs.

Section one defines the area covered in this unit: large-scale energy infrastructure of 3 types: electric power, upstream petroleum and mining. Petroleum and mining are known as extractive industries, rather than energy infrastructure, but there are enough similarities in the local impacts of all these sectors to allow one training unit to cover them all. Mining is only related to energy through coal mining.

If students from these areas want to change or add to the list of areas involved, that's fine.

Section two presents the main gender issues in the local impacts of infrastructure development and the extractive industries. The trainer can encourage participants to add points or situate points within local contexts or even to question points, as long as they are thinking about how the points made relate to their work.

Artisanal and small-scale mining is a crucial area for mining GFPs to address, because of its severe effects for women, who are often involved as the cheapest labour. It can be present in coal mining but is not relevant to oil and gas production or to power generation and transmission.

The next two sections point out gender aspects of environmental requirements and consultations, and some difficulties in implementing and enforcing them. Section three should discuss environmental assessment and management processes from a gender perspective. Participants can be asked to brainstorm on what the gender issues are and how they can be addressed.

Section four points out that the presence of comprehensive environmental legislation, licensing procedures and management structures does not guarantee effective enforcement of regulations and requirements. Participants should be encouraged to bring up other points and concerns from their own work, about which others can comment.

Section five focuses on community development projects and Corporate Social Responsibility initiatives. These types of projects are mainly undertaken in the extractive industries, but similar projects can be part of environmental mitigation programmes for electric power development, especially where people are moved to other locations. The point here is that both women and men from the local communities need to be involved in the choice and implementation of community development projects.

The question can be asked of participants whether they think the choices, implementation and maintenance of the projects would be any different if women from the community were directly involved. If yes, why and how?

Exercise: Summarize gender issues in energy infrastructure, upstream petroleum and mining

This exercise is intended to help students organize key issues analytically, so as to be able to identify them more easily in their own work.

Divide the participants into three groups, according to their areas of work: 1. electric power, 2. petroleum and 3. mining.

Ask them to think about the material presented and to identify and summarize the key gender issues in energy development in their specific subsector.

Give them the following 4 categories as a starting point:

- Employment
- Social and gender impacts on local communities of construction and operations
- Social and gender impacts on local communities of accidents, spills and pollution (hazardous wastes and emissions)
- Community development projects, CSR initiatives

Ask them if they can think of any others, and be sure the following two are mentioned:

- a. Public spending and revenues from extractive industries: gender differences in the benefits and risks of the use of government revenues from taxes, royalties, production sharing agreements, or direct ownership in extractive industries. There may be gender issues in how revenues are allocated and spent, but these issues can only be identified when the government makes revenue and spending information public.
- b. Accountability of government and companies on human rights and gender equality commitments: the need to monitor conditions of EI operations, in order to ensure that government commitments and requirements on human rights and gender equality are met.

These 2 categories are mainly relevant for the extractive industries.

A table showing possible details for all these categories follows below (at the end of the notes for this unit). It can be given out at the end of the discussion or during the discussion, whichever the trainer considers most useful.

Case Study Exercise: Gender issues in project implementation

These case studies are news stories found on the internet. They do not mention gender differences. The purpose of this exercise is to think of the different situations and problems experienced by women and men in the examples given, so as to identify ways to improve them in situations encountered in their work. The cases specifically relate to Mozambique and trainers are encouraged to seek out examples from their own country or to ask participants if they know of similar cases.

Divide the participants into three groups, according to their areas of work: 1. electric power, 2. petroleum and 3. mining. Each group will read the relevant case study and together discuss the related question.

After 20 minutes of group work, someone from each group will briefly summarize their discussion for the whole class. The trainer should encourage discussion on what possibilities there are for prevention of problems and interventions when problems emerge.

The case studies:

Case Study 1 for the electric power sector: Mphanda Nkuwa Hydropower, August 2010

The reason for choosing this example is that it indicates potential negative effects of hydropower development, even with comprehensive environmental safeguards in place. The news article was written in August 2010, so the GFP from the EDM ESU may be able to comment on what has happened since then and which measures have been taken to protect existing livelihoods and the resources women depend on to care for their families. The question remains as to how to ensure that the men, women and children who are directly affected end up in better situations as a result of large hydropower projects, and not worse off.

Case Study 2 for the upstream petroleum sector: Pande Gas Blowout, 1965

The reason for choosing this example is that it is the only known case of serious local impacts of petroleum development in Mozambique. The source of information was from a Norwegian who had worked in Mozambique at that time. The fact that this case was not mentioned in Energia Team discussions on social impacts with INP representatives raised questions in the Team about how the accident and its effects were treated. The INP GFP in this training course may be able to comment on how current accidents will be treated and how gender differences should be considered.

Optional additional petroleum Case Study: The impacts of oil development on the Ogoni people of Nigeria (see Appendix 4)

The reasons for choosing this example are that it shows the worst case scenario of the social and environmental effects of petroleum development and there is a great deal of information about it. This case is presented as a warning about what needs to be avoided.

Case Study 3 for the mining sector: Coal mine protests in Tete, February 2012

The reason for choosing this example is that it shows problems in resettling communities, even where the responsible company claims to have spent 3 years working with villagers to plan their move. The MIREM GFP may have additional information on government efforts to resolve community difficulties and may be able to comment on ways to involve women in the planning and implementation of such efforts in the future.

Social and gender issues in energy infrastructure, upstream petroleum and mining activities

Electric power infrastructure development	Upstream petroleum	Mining	Social and gender issues
<p>Construction and operation of:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Generation plants (including large hydro-power) <input type="checkbox"/> Substations <input type="checkbox"/> Transmission lines 	<p>Construction and operation (onshore and offshore) of:</p> <ul style="list-style-type: none"> <input type="checkbox"/> drilling rigs and wells <input type="checkbox"/> supply bases <input type="checkbox"/> pipelines 	<ul style="list-style-type: none"> <input type="checkbox"/> Extraction <input type="checkbox"/> Storage <input type="checkbox"/> Transportation <input type="checkbox"/> Processing <p>Including artisanal and small-scale mining (ASM)</p>	<p>a. Employment: Employment opportunities and development of national and local expertise and skills of both men and women</p> <p>b. Social and gender impacts on local communities of construction and operations:</p> <ul style="list-style-type: none"> <input type="checkbox"/> increased economic opportunities for men and women of improved roads, transportation, communications, information, and development of local commerce & industry <input type="checkbox"/> land acquisition and compensation: different needs, treatment and compensation of women and men displaced and/or resettled by construction activities, eg. loss or disruption of livelihoods, food sources, and social networks <input type="checkbox"/> differential impacts on women and men from the influx of male foreign workers and likely increase in “social vices” (drinking, gambling, prostitution) <input type="checkbox"/> Impacts on women and men of new product availability, eg. LPG replacing fuelwood for cooking <p>c. Social and gender impacts on local communities of accidents, spills and pollution (hazardous wastes and emissions):</p> <ul style="list-style-type: none"> <input type="checkbox"/> immediate and direct health effects and long term health impacts (including reproductive health) of contaminated water, air and soil <input type="checkbox"/> immediate and long term economic impacts of ecosystem damage: loss & damage to livelihoods resulting from disruptions in water quality and availability, fisheries, crops, forest resources, etc. <p>d. Community development projects, CSR initiatives: differential involvement of women and equitable gender impacts</p> <p>e. Public spending and revenues from extractive industries: equitable gender impacts</p> <p>f. Accountability of government and companies on human rights commitments for men and women</p>

UNIT 5

Gender Mainstreaming

This unit introduces the concept of ‘mainstreaming’. The course is mainly geared to mainstreaming gender, which is the core of the work of the Gender Focal Point, but it is important also to understand that there are times when a ‘women-only’ approach may be useful. The term “mainstreaming” is a familiar one to gender specialists and less likely to technical people from the energy sector. However, even people who use the term may not be entirely clear what it means or entails (it can be a goal in itself or an approach to achieve a particular end). There is also a lot of confusion about the concepts of gender equality, gender equity and women’s empowerment. Gender equality and equity are often used interchangeably but they are different. Women’s empowerment is also open to a multitude of interpretations which are usually linked to people’s motivation for why they want to promote empowerment.

These concepts need to be clearly understood but not so much in a theoretical way but how they can be used effectively in energy policy. The emphasis should be on how gender mainstreaming works (or can work) in the context of people’s jobs. Experience shows that people (yes women can also resist gender mainstreaming) are more receptive of the concepts when addressed in what are considered less personal and threatening ways. The trainer can begin the session with getting clarity about the terms but most of the time should be devoted to the exercises.

The energy sector has been late, compared to other infrastructure and rural economy sectors, to adopt gender mainstreaming. Discussion point 1 asks the participants to suggest reasons for this. The text offers suggestions to explain this - some of which are under the influence of the energy sector (eg lack of sex-disaggregated data about energy use, needs and preferences) and some not (eg socialisation of children – what society considers acceptable for girls and boys to do). This discussion point could be left out.

Discussion point 2 is linked to exercise 1. The idea is for participants to begin to understand the status of gender mainstreaming in their own organisation. They may not know the answers to all the questions. The point here is that they should find out on their return to office. This should be made clear and participants shouldn’t dwell on questions they don’t know the answer to. Please note some of the questions refer to the MoE, that is, the Ministry of Energy. Participants who do not work for the Ministry of Energy you should answer the questions in relation to their own organisation. If it is a group from different organisations grouping participants per organisation would be the best option. If the group is from the same organisation split per department – particularly between office and field staff – who will use gender in different ways in the context of their work. Alternatively mixing departments can create an understanding of how other colleagues see the role of gender in their work.

Box 1 expected outcomes from gender mainstreaming which emerged from a mainstreaming exercise in the Botswana Power Corporation (BPC). Participants can be asked for their reactions to these points. Do they see the same opportunities arising in their own organisation? Such case studies can help convince those who are uncertain about the benefits of gender mainstreaming.

One of the goals of gender mainstreaming is gender equality. While many people are not opposed to gender equality they are not convinced that this has anything to do with the work of the energy sector. Gender Focal Points and Gender Champions will have to address these sceptics at some point. Exercise 2 should be done quickly. The idea is to be able to convince people that gender equality is part of energy sector and this can be effectively done in short informal exchanges – people need to be able to react quickly and convincingly.

The final section presents some of the arguments which the trainer can run through after the exercise. Box 2 provides evidence from the World Bank about increased efficiency through mainstreaming gender in infrastructure projects.

UNIT 6

Relating Gender Goals to Energy Policy

Participants will need to have dealt with the units ‘Why is Gender Important in Energy Policy?’ and ‘Identifying Gender Needs and Gaps for Developing a Gender-Aware Energy Policy’ before starting this unit. The approach uses the analytical framework ‘Practical and Productive Needs, Strategic Interests’.

The idea that there might be different types of gender goals is a very new one to many people – most people assume that the idea of using a ‘gender’ approach in planning is to ‘help’ women, but they do not really think through the question – help them do what? What are we trying to achieve by ‘helping’ women? Is this intervention really what women want? This unit aims to encourage participants to think much more clearly about exactly what she/he wants to achieve by using a gender approach, and to recognise that other people may have quite different ideas about this – including the target group themselves!

Start by introducing just the first three gender goals – welfare, productivity, and empowerment – participants can be asked how these relate to the kinds of needs identified - practical and productive needs, and strategic interests. Ask the participants to talk about energy projects they know or are involved in, and to say whether they are fundamentally aimed at welfare, productivity or empowerment. You could make a table on the blackboard with three columns and note down the names of these different projects. Discuss for each of the projects that are suggested, why it is to be classified as ‘welfare’ or ‘productivity’ or ‘empowerment’ to clarify the criteria.

Participants can read case 1 (Ugandan solar dryers) and decide which type of gender goal it represents (a) a welfare and (b) a productivity approach, respectively. Allow debate on these, if participants have their doubts.

Discussion point 2 returns to an issue raised in the unit ‘Identifying Gender Needs and Gaps for Developing a Gender-Aware Energy Policy’: does access to energy empower women? It is probably not so much energy access itself which may empower women, but more the way the project is planned, organised and managed that give women opportunities for empowerment. The discussion point also asks whether or not it is the role of energy policy to empower women in the sense of transforming gender roles and relations. This is probably the goal many male (and some female) engineers are most uncomfortable with. The discussion leads onto the fourth goal.

The fourth type of gender goal is of another order: it is an instrumental goal, but it is one that in reality is quite common. Here the aim is not to improve the situation for women per se, but simply to increase the chances of policy success by recognising that there are in fact two ‘markets’ – men and women – with different needs from policy – it is better to look at the characteristics of both groups. This may be a strange idea to the participants at first (however, we fear that this is probably the goal that many male engineers in the energy sector feel most comfortable with). You could explain that this is a not gender aware, but gender neutral approach.

While the discussion has focused so far on implementation, policy has to be formulated to create the desired implementation. The next section and table 1 does that. The trainer could distribute copies of table 1 with the cells in the last column blank and ask the participants for policy level goals.

Table 2 looks at how to match different gender goals with energy interventions. This could be used for discussion: in particular, what other energy interventions could be identified to match each goal?

The unit concludes with an exercise (which could be omitted if time is short). Participants are asked to provide suggested interventions in an urban setting which is often neglected for low-income households where the assumption can be availability is better than in rural areas therefore access must be better.

UNIT 7

Indicators for Achieving Gender Goals

This unit follows on from the unit “Relating Gender Goals to Energy Policy”.

Indicators are important monitoring tools. Gender mainstreaming will require indicators to monitor progress and evaluate processes and outcomes.

It is quite likely that participants will have experience with using indicators even if they have not written them. Therefore the trainer can start the sessions with discussion point 1. The aim here is explore opinions and experiences about different types of indicators. Professionals with a technical background can feel uncomfortable with qualitative indicators which are much more in the domain of social science. Professionals with a social science background can feel unhappy with development progress being reduced to numbers but numbers can also be quite powerful in making impacts eg 40% of households are headed by women yet only 5% have an electricity connection. The point to reach here are that both are important and should be seen as complementary since they track different aspects.

The second general point is that development needs gender indicators to track gender mainstreaming. Here the issue is to avoid indicators that are gender neutral since they can mask gender issues. For example the indicator “number of new electricity connections made” misses the point that women headed households can have greater challenges to connect than male headed households in similar circumstances. So an indicator should measure the same rate of connection of woman-headed households to man-headed households.

The text refers to SMART indicators. These have become quite popular with development agencies and while they are rather formulaic they can be very useful to use with people who are not so familiar with writing indicators. Participants can be asked for their experiences with SMART indicators.

The trainer should round off this section with a slide which defines the different type of indicators. At this point the different levels of indicators could be referred to.

The next section talks about data collection for indicators. The methods will vary with the level of indicator and category. Again participants can be asked for their experiences with data gathering. What does their organisation do? Table 1 contains some examples of data collection methods. Each has its strengths and weaknesses.

Table 2 makes an important point that one has to be clear about what an indicator does and doesn't measure.

The next section deals specifically with gender indicators and links them to gender goals. Some important questions are listed for use when developing goals. The point here is to be systematic so as to obtain a useful tool.

Table 3 gives examples of gender indicators for reaching gender goals. The trainer could give the group the table with the cells in the last column empty and ask them for suggestions for indicators. Encourage them to give one qualitative and one quantitative.

The last section had important points about the need for baselines and targets. An important point here is the distinction between outcome and output.

The exercise (30 minutes) is about developing indicators particularly to encourage participants to use qualitative ones. It can be done either individually or in small groups (2 or 3 participants). The answers to the first part of the exercise are given below. For the second part some suggestions are given.

If time is short, the trainer can share out the variables for the second part among the groups, and then discuss the pooled results in a plenary session.

Indicator	Type:
Number of connections to an electricity network.	<u>Quantitative</u>
Women feel electricity has brought benefits to their lives.	<u>Qualitative</u>
The number of electricity blackouts.	<u>Quantitative</u>
Kerosene supply has improved.	<u>Qualitative</u>
Number of women using LPG for cooking	<u>Quantitative</u>
Percentage of household tasks done by men	<u>Quantitative</u>
Existence of an energy sector policy on household energy	<u>Qualitative</u>

Variables	Indicators
Policy support for gender-sensitive participation	<u>1.Existenceofanationalsectorpolicyforbiomassenergy</u> <u>2.Gender-awarenationalenergypolicy</u> <u>3.Theexplicitnessofgender-goalsinthepolicy.</u>
Institutional support for gender-sensitive participation	<u>1.Thepresenceofgender-disaggregateddata</u> <u>2.Thetypeoforganisationsinvolvedintheprocess</u> <u>3.Thewaygenderisreflectedinorganisations'documents</u>
Gender integration at implementation level: ESCOs	<u>1.Numberofmenandwomentrained</u> <u>2.Numberofmenandwomendrop-outs</u> <u>3.Benefitsfromprojectparticipationformen/women</u>
Gender integration at implementation level: Users	<u>1.Numberofmenandwomeninterested</u> <u>2.Benefitsfromoutcomesoftheprojectformen/women</u> <u>3.Numberofmenandwomenreached</u>

UNIT 8

Gender Organisational Assessment: Assessing the Capacity of Energy Sector Organisations to Mainstream Gender

This unit focuses on organisational assessment which forms an important part of the work of the Gender Focal Point. This assessment is focused both on participants' own organisations, and on other organisations that may be involved in energy policy development and implementation.

Discussion point 1 is an introductory discussion about the experiences of the participants in relation to organisational assessment. The trainer can conclude the discussion with the functions of a GOA. The unit provides tools and techniques to do a GOA.

The trainer can get the group to practice the different tools which are found in appendices at the end of the unit. The group up and assign the tools for testing. Appendix 1 contains Semi-Structured Interview Guide, Appendix 2 contains Internal Self-Assessment Questionnaire on Gender Mainstreaming for the Staff of an Energy Sector organisation and Appendix 3 contains Focus Group Discussions. A focus group discussion needs to be led by someone with experience of this type of tool.

Allow 30 minutes to practice and 15 minutes in plenary to share experiences both about using the tools and what they are starting to reveal about their own organisation.

If time allows the participants could discuss cases 1 and 2 in light of the experiences with the tools. Case 1 is linking the tools to a Gender Action Plan. Case 2 provides information about the organisation. How would you make use of the information? The case shows a need for awareness raising to clarify issues and also highlights areas for training.

The trainer could return to discussion point 2 which asks how they think staff feel about being interviewed or completing questionnaires on 'sensitive topics'. This is an important issue for the Gender Focal Point and is returned to in developing the Gender Action Plan. It is also worth pointing out that not all men are opposed to gender mainstreaming and not all women are in favour.

The concept of a Gender Organisational Profile is introduced. Participants can be asked what they see as the benefits of developing this. Box 1 provides data from a real situation and the reaction of the staff from the organisation. The numbers have been very powerful in raising awareness.

The unit concludes with a potentially controversial point about how to deal with partner organisations. Should the gender organisational capacity of the organisation be used as a criterion of selection?

UNIT 9

Policy Implementation, Monitoring and Evaluation

This is an important unit which builds on the unit 'Indicators for achieving Gender Goals'. For the Gender Focal Point it is not only necessary to monitor and evaluate the implementation of the Gender Action Plan but also to ensure that the implementation of energy policy is monitored and evaluated.

Participants can be asked to explain the difference between monitoring and evaluation. When do they take place? What have been their experiences?

Participants will need a copy of Table 1 which is linked to the exercise. This table shows different types of results – participants need to be clear about these – at what point do they occur? The table is also important for understanding how policy is formulated and so how it can be mainstreamed.

A tool for evaluation is mentioned in the text and forms part of a unit in the manual: Gender Audits. Some participants may be familiar with gender budgeting – although it is not common in the energy sector. Gender budgets and audits are not quite the same tools. Participants could be asked for their experiences while Box 1 gives some findings from Energia's experiences with gender audits in the energy sector of a number of African countries.

The exercise uses a tool from the World Bank. The group can be divided between the different policy objectives given in the table or gender goals developed earlier with the group could be used. This can lead to a refinement of the goal. It is not necessary to complete column 3. The important lesson here is about the nature of data to be collected and who uses it and how. More than one person can use the same data for different purposes.

The appendices contain generic gender checklists for use in monitoring and evaluation. The questions are not exhaustive.

UNIT 10

The Role of the Gender Focal Point

This can be considered a very open-ended session. The aim here is to get participants to brainstorm and exchange ideas, as well as raise issues of concern that other participants can share suggestions on how to solve challenges.

A suggested approach is to start the training programme (if it is for GFPs only) with this unit in the first session and return to it in the last session to see if the training has changed participants thinking.

There are two key issues to be discussed:

1. What is the role or tasks of the Gender Focal Point? (See sample ToR in Appendix 1)
2. What is the best organisational structure a central gender unit or specialised gender staff spread through the organisation? (Discussion Point 1)

A problem for many GFPs is that they don't know where to start – particularly if they have been allocated the task rather than applied for a specific post. Section 3 contains some suggestions of actions that GFPs can take to get started. These can be discussed in plenary. Participants can come up with their own suggestions.

UNIT 11

The Gender Action Plan

The time devoted to this unit will depend on the target audience. If the group consists mainly of Gender Focal Points then it will deserve more attention than groups with a broader base who are particularly interested in understanding gender mainstreaming in the energy sector. The Gender Action Plan (GAP) should form the basis of the GFP's work. All the other units in the manual feed into this plan and references are made to the relevant units throughout the text. It is suggested that at the start of the training the GAP concept is introduced and indicating which elements are included in the training. This could be part of the 'introduction to the course session'. At the end of the training course a more detailed session could be based on the material in the unit.

The discussion could also on how to develop a GAP. A question to ask is how to consult local communities and how to ensure good gender balance in the input. What is the group's experience with participatory approaches? Ministries of Energy tend not to have a great deal of experience with bottom-up planning (one of the reasons women's energy needs and preference are missed). Table 2 provides an example of output from a consultation workshop with solutions proposed by participants.

A section that all groups should cover in plenary is: Conditions for a Gender-Aware Energy Policy. The text presents findings from research and the trainer could give a brief overview. Participants could then respond to this using the discussion point – do these conditions exist in their country. They may also consider other conditions are necessary.

An exercise (which is a useful re-entry mechanism) is for all types of target groups to be given a blank template of Table 1 – possibly with one line of cells completed to show what is required – and give 30 minutes to complete as many energy policy issues as possible (ideally of course the issues should have emerged in a consultation workshop). The aim of such an exercise is that it helps participants bring together the elements of the training and show how they can be used to mainstream gender into energy policy.

UNIT 12

Communications Strategy

A communications strategy is an important part of the Gender Action Plan and plays multiple roles. There are some actions a GFP can take her/him-self but there are others that might require someone with a professional qualification in communication science. A ministry or utility might have a department or there is a dedicated unit at government level which is responsible for outside communications and there will be an established protocol which the GFP needs to be familiar with.

The core of the strategy is: identify target groups, decide what do they need to know and then what is the best way to tell them. Discussion point 1 can be used to for brainstorming.

Box 1 gives an example of a Communication Strategy for Developing a GAP. Participants can be asked for their reactions. Would it work in their circumstances? What would they do differently?

Box 2 describes an interesting network of women in the energy sector in Ghana. Participants could discuss whether or not such a network exists in their own country. What have been their experiences? If there isn't one: should there be one? What form could it take? Could it be an outcome of this training?

Box 3 describes how a utility communicated to the workforce information about the organisation's GAP. Participants could be asked to reflect on their own organisation – what would they do?

The Unit finishes with an exercise which helps participants get started on developing a communications strategy. Participants are asked to work in groups and complete the individual sections for a specific activity that is either part of the preparation for the GAP (eg presenting to senior management the need for a GAP – see Box 1) or is part of the GAP (eg explaining to field staff and implementing partner organisations the need for gender mainstreaming). Table 1 gives some useful ideas about methods for different target groups.

UNIT 13

Dealing with Resistance to Gender Mainstreaming

This unit is linked to both the Gender Action Plan and the Communication Strategy. It is in part informative – to offer explanations about why people resist gender mainstreaming. When we understand why it can help us feel less frustrated and can help us design appropriate strategies to overcome resistance.

The material can either be presented (and there are discussion points to assist with this) or given to participants to read. The explanations about why people behave as they do are from one researcher's ideas. There may be other explanations and the trainer can offer these as an alternative.

Approaches to overcoming resistance are suggested in section 3 and there are tips on how to carry out negotiations in section 4.

There are two exercises at the end of the unit. Exercise 1 introduces Force-Field Analysis which participants can work on individually. The idea here is identify forces and strategies to overcome negative ones and if possible build on positive ones.

Exercise 2 contains three cases which the participants will probably recognise. The trainer can divide the group into teams to work with the three cases shared out between teams or select one case (perhaps participants could choose which they feel they need more help with) for the whole group to focus on. Participants should present their conclusions in plenary.

UNIT 14

Personal Action Plan

Participants should be explained the purpose of the exercise, and urged to think critically about the things that they have learned during the course, and whether, and how, they may be able to apply these in the normal course of their regular work. Each participant should be asked to work through the following format, but should not be limited in their comments (this is not a form to be filled in, but a framework for developing ideas).

The exercise helps participants design a strategy for using what they have learned on their return to the office. Too often people complete a training course where they have learned a lot and gained new skills but can sometimes feel overwhelmed with how to use it all. This is a very practical way to overcome that 'post-training dip'.

This exercise can be useful to the course organisers/sponsors for follow-up, either to assess the impact of the training or to provide backstopping in the implementations of the plan.

If time allows, participants could present their action plans. The group might already be able to offer advice and tips for overcoming inhibiting factors.

Presentation can be as a poster. Allow time for group members to circulate and read the other posters. They can pin/stick suggestions onto posters.