

## THE SERIES' FOUR COMPONENTS:

Background papers  
Quick guides to what and how  
**Tools**  
Inspiring initiatives

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*This guide is based on lessons learned from similar exercises carried out in Albania, Ethiopia, Macedonia, Kosovo and Zambia.*

**Introduction**

The Swedish government has made Women's Economic Empowerment (WEE) a priority area in development cooperation. Sida has therefore developed methods and tools to improve results for women's economic empowerment in partner countries.

This guide is one of Sida's tools and aims to identify entry points for increasing support for women's economic empowerment in Sida's portfolio. This guide outlines a portfolio analysis of ongoing programmes and will support country teams in strengthening their work on women's economic empowerment. However, it can also provide a basis for discussions on WEE between Sida and its partners.

The first section of this tool provides Sida with guidance and recommendations on how to conduct a portfolio analysis. The second section constitutes a draft Terms of Reference for the consultant who will carry out the analysis.

**Goal:** to identify important obstacles to women's economic empowerment in the specific country and identify entry points and actions for addressing these problems. The analysis will serve as a basis for the country team's strategy/action plan to improve results in terms of women's economic empowerment.

**When to do it:** the portfolio analysis is particularly useful for ongoing programmes and/or for the mid-term review of cooperation strategies as it focuses on the operational level.

**Input needed:** the Gender Equality Team can provide support in the design of the analysis, drafting Terms of Reference, coaching consultants and advice on the

recommendations in the report and the Team's strategy/action plan.

The Country Team is the owner of the process and therefore defines the scope of the analysis and its areas of focus, and also provides the funds and supervises the process.

The consultant will analyse the portfolio, provide recommendations, suggest actions and help the team prioritise actions for the greatest impact. The consultant can also provide support to the Country Team in its implementation of the strategy/action plan through, e.g., training of the Country Team and/or partners, in-depth analysis of specific programmes and operationalising dialogue strategy.

#### *What the portfolio analysis is not*

The analysis of the portfolio is a fairly quick exercise with a focus on forward-looking entry points and therefore does not provide in-depth analysis of the issues or the portfolio. Neither does it assess or evaluate the results achieved by the programmes in the portfolio. The analysis results in a report that is more of a working document than a report that can be published.

### Getting started: considerations for the Country Team

While the suggested purpose is outlined below, it is up to the Country Team to decide upon the scope and use of the analysis and the report that comes out the exercise. If the portfolio analysis is planned as a process rather than as a one-off intervention, it can be used as a learning exercise for Sida, its partners and possibly also for co-financing donors. It is therefore useful to consider the following at the outset:

- Who is the intended reader of the report? Only the Sida Country Team or programme partners, other donors, civil society actors?
- How will the Country Team make use of the recommendations? Will it feed into the mid-term review or the planning process of a particular contribution? Can the recommendations be discussed in sector coordination/working groups?
- Does the team have enough knowledge about women's economic empowerment to be able to implement the recommendations or should some kind of capacity building be included in the Terms of Reference for the consultant? If partners are to be involved, do they need similar capacity building or fora to discuss the findings? The consultant can be assigned to facilitate such an exercise.

It is recommended that the person responsible for managing the contract with the consultant also be given the authority to lead or facilitate the process within the Country Team.

The portfolio analysis is an excellent opportunity to learn more about women's economic empowerment and it is advisable that the sector desk officer or the gender focal point participate in some or all of the interviews together with the consultant.

#### *Time required*

The time needed is, of course, dependent on the size of the portfolio and the extent to which the consultant is assigned to provide support in the implementation phase. The estimated time for analytical work is 15-20 days for preparation, a country visit and report writing. Additional time depends on how much support the Country Team requests for assistance in drawing up the action plan on how to take the recommendations forward, for implementation activities and any capacity building. The process will probably take a few months. The analysis can be done quite quickly; a week's visit is probably enough and the report can then be produced. It is important that the Country Team allocate enough time for

the desk officers to read the report, discuss the recommendations together and prioritise the actions ahead.

#### *Practical issues related to management of the consultant*

The person responsible for managing the consultant and possibly the entire process should do the following:

- Assist the consultant in finding relevant background material as suggested in the draft ToR below and in arranging meetings with selected partners.
- Arrange for an introductory meeting with the consultant and the Country Team at the outset of the analytical work and a debriefing meeting before the consultant departs. Individual interviews with programme officers are needed within all supported sectors.
- Make sure that the Country Team allocates enough time to discuss the findings as a team and decide upon what to prioritise.
- Facilitate the drawing-up of an action plan indicating who does what and when. It is advisable to be realistic in what the team can achieve and it is therefore better to make a shorter action plan that is implemented well than a long list of activities that are not.

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## Template: Terms of Reference for the consultant

The information below is useful for the Country Team in the planning process, but is essentially a template for the terms of reference for a consultant.

### Objective/scope

The objective of the portfolio analysis is to:

- Identify the main obstacles to women's economic empowerment in the country; and
- Provide the Sida Country Team with specific recommendations for how Sida can better contribute to women's economic empowerment in Sida's contributions, in dialogue and in development partner working groups/ donor coordination.

The consultant should:

1. Identify the main obstacles to women's economic empowerment in the country by reading a few reports on gender equality and by interviewing key stakeholders.
2. Identify partner country government commitments to addressing these challenges and possibly identify omissions in national development plans or similar, sector-specific strategies and strategies on gender equality.
3. Review the country portfolio to a) assess if the portfolio addresses the identified challenges to women's economic empowerment, b) identify entry points for strengthening the focus on women's economic empowerment by adapting current programmes, by means of new contributions and through dialogue. The review may include a general assessment of the aid architecture and the opportunities for addressing women's economic empowerment in the context of harmonised dialogue and joint funding arrangements. The analysis should be based on Sida's understanding of women's economic empowerment as outlined in Sida's Working Paper: *Women's Economic Empowerment: Scope for Sida's Engagement*.<sup>1</sup>
4. Produce a short report/discussion paper that outlines the main obstacles to women's economic empowerment and provides recommendations and suggested actions for

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<sup>1</sup> Sida Working paper, 2009, Article no: SIDA52479en, available at [www.sida.se/publications](http://www.sida.se/publications).

the Country Team on how Sida can contribute to women's economic empowerment in current programmes, with new contributions and in dialogue and donor coordination. The list of suggested actions can be long, but in order for the Country Team to be able to prioritise activities it needs to contain information on how much effort is needed for each action and how important the action is in view of the expected outcome for women's economic empowerment. See Annex 2 for an example. Develop steps and recommendations on how a WEE focus can be incorporated into the existing country program, using the various interventions such as program support, budget support, donor coordination and dialogue, etc. Recommendations related to the working processes of the Country Team can also be made.

5. Hold a workshop with the Country Team to present findings and facilitate discussion on how the country team can take the recommendations forward. Possibly also assist the Country Team in drawing up an action plan for this work.

Please note that the analysis is not intended to be a comprehensive analysis of all the challenges to women's economic empowerment or all government commitments. The analysis needs to be forward-looking and focus on identifying opportunities and therefore should only identify *key* obstacles and some commitments related to these challenges.

## The concept of Women's Economic Empowerment

### *WEE concept*

Sida has identified seven key areas that are critical to improving women's economic empowerment. These are presented in Sida's Working Paper: *Women's Economic Empowerment - Scope for Sida's Engagement*. They include: entrepreneurship and private sector development; access to land and property rights; labour markets and decent work; unpaid care work; human capital; social protection; and agriculture

For more information, the WEE concept is also elaborated in two discussion papers:

- *Women's Economic Empowerment, Key Issues and Policy Options*<sup>2</sup> by Naila Kabeer, which provides a broader perspective.
- *Women's Economic Empowerment in Conflict and Post-conflict Countries*<sup>3</sup> by Maria Elena Ruiz Abril

*Appendix 1* contains a list of the seven areas with some guiding questions that can be posed about the material to key stakeholders.

## Step 1: Background material

The following material will be useful.

### *Sida-specific material:*

Sweden's Strategy for Development Cooperation with the country in question

Sida Gender Country Profile (available for several category 1 countries)

Mapping of gender issues and gender equality (available for most category 3 countries)

Sida's Working Paper: *Women's Economic Empowerment: Scope for Sida's Engagement*

Specific gender studies/evaluations

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<sup>2</sup> Sida Working paper 2010, Article no: SIDA51910en, available at [www.sida.se/publications](http://www.sida.se/publications)

<sup>3</sup> Sida Working paper 2010, Article no: SIDA51911en, available at [www.sida.se/publications](http://www.sida.se/publications)

*Programmes:*

List of ongoing programmes  
Relevant project documents (at HQ and Embassy)  
Project/programme evaluations  
Specific gender studies carried out by Sida

*Country material:*

PRSP or similar for the current period (priorities, goals and indicators at country level and for sectors)

For category 3 countries: Accession Partnership, European Neighbourhood Partnership Agreement or Action Plan/Acquis Communautaire<sup>4</sup> (for EU accession countries) or similar

National strategy, action plan or laws on gender equality

Sector strategy for sectors where Sida is engaged and which are of importance for WEE, e.g. Agriculture, private sector, strategy for growth

Note: also look at policies and strategies related to labour, social security, etc.

*Other donors' material:*

EC Country Strategy for category 3 countries

UNIFEM country-specific reports

Other donors gender-specific reports/evaluations (Embassy has good knowledge of which donors are active on gender equality)

Gender statistics, if produced

## Step 2: Interviews

Below are some suggestions for interviews. The selection should be made on the basis of country context.

Actor	Interviewee	Information sought
	Programme Officers for the relevant sectors	Info on each specific programme, donor cooperation in the sector, identifying how gender issues are dealt with in the sector.
<b>Embassy</b>	Country Director/Manager	Gender issues in the donor-government dialogue, joint donor group work on gender.
	Gender focal point	The Embassy's work on gender equality.
<b>Government</b>	Government machinery on gender equality (Gender Ministry or similar)	Overall government work on gender equality, priorities, problems, specific strategy on gender equality, sector cooperation, macroeconomic/budget work on gender.
	Ministry of labour/social affairs	Policies on labour market and social affairs, targets for increasing women's employment/economic activity, programmes and services available.

<sup>4</sup> See separate Sida tool: A guide to EU acquis and strategies on women's economic empowerment

<b>NGO/CSO</b>	Women's organisations	General situation analysis regarding gender equality
	NGOs for the specific sector	Problem area/target group info
<b>Donors</b>	UNIFEM	General situation analysis regarding gender equality
	Other Donors	Select a few of these with specific gender programs, ILO (usually good info on decent work and PSD relevant issues) EU, UNDP, WB?
<b>Partners</b>	Relevant partners for ongoing programmes/projects	Their work, goals, action plan etc on gender equality. Problem analysis in relation to WEE issues – identification/discussion of gender relevant issues (discuss with Programme Officer who will be relevant to visit)

### Step 3: Report writing

#### *Target group*

The Country Team decides on the future use of the report and the target group and whether the report should be written for the Sida Country Team or also a larger audience, e.g. programme partners and other donors. An introduction and background should be written to make the report understandable to readers familiar with country and development context. Abbreviations should be explained.

#### *Content*

1. *Introduction*, including Swedish commitments towards WEE and, where relevant, EU commitments, description of the definition of WEE and the seven areas.
2. *Description of women's economic situation* in the country, outlining the main obstacles for WEE and possibly opportunities.
3. *Partner country commitments* to WEE.
4. *Recommendations* for results on WEE in ongoing programmes and the Sida portfolio in general, as well as for the team working process. A priority list to be included, see example in Annex 2.

### Step 4: (recommended): Advice and support to Country Team

In-depth advice and support to the Country Team in implementing the recommendations. Building of the team's capacity and possibly partners with regard to what women's economic empowerment is, the situation in the country and what could be done. The consultant can bring in a local expert to talk about the situation in such a workshop.

## Annex 1: Analytical issues and questions

### Analysis of Country Poverty Reduction Strategies/Gender Strategies/Action Plans

Analysis of current country strategies should be done with the aim of assessing the extent to which relevant WEE issues are being addressed in overall government strategies (especially PRS or similar). How overall goals are transferred down into sector strategies in the relevant sectors and to what extent the strategies address WEE. In category 3 countries it is important to follow up the EU Gender Aquis implementation in relation to WEE.

- Does the PRS or equivalent address WEE issues? Is it being implemented?
- Are there targets and indicators for WEE?
- Is the national action plan on gender equality or equivalent addressing WEE issues?
- Does the national machinery have the mandate, capacity and resources to implement the action plan/bring about change?
- Does the Performance Assessment Framework include the important WEE issues?
- What do other donors do – are there good examples to learn from/look into, are there donors that can be allies in WEE? Is there a need for dialogue with donor partners to raise awareness? What dialogue openings are there?

Below are some guiding questions which can be addressed under each of the WEE areas:

#### 1. Building women's human capital and capabilities

- Is education accessible to everyone? Primary education is a necessary first step but the greatest pay-offs in terms of women's economic empowerment are gained through post-primary education. If not – what are the factors preventing women and girls from accessing education, e.g. the schools prevent girls, are too far away or too costly, girls too occupied with household chores, patriarchal norms against women's participation, etc.
- What is the *quality* of education like? Is it a vehicle to reproduce pre-existing social inequalities by fostering gender stereotypes? Or does the curriculum include a human rights approach, discuss gender inequalities and support non-traditional choices, etc?
- Are there Vocational and Education Training (VET) programmes in place that can provide adult women who missed out on education with a “second chance”? Are these gender-aware, i.e. are women trained in non-traditional female occupations/competences (and not simply trained in hairdressing, secretarial skills, etc)? Do they support women beyond the training itself in terms of job placement services?

#### 2. Redistribution of reproductive workloads and unpaid care work

- To what extent do tasks assigned to women in the gendered division of labour prevent them from entering education or the labour market? E.g. time spent on collecting water, organising energy, transport etc. (infrastructure investments are relevant here, e.g. water, electricity, roads etc).
- Addressing the male role, and gender norms.
- To what extent do unpaid care responsibilities assigned to women and girls prevent them from entering education or the labour market? E.g. care of children, sick and the elderly (such work needs to be transformed into collectively shared social responsibilities, e.g.

day-care facilities, collective caring for the elderly or publicly financed facilities; a change in the gendered division of labour is crucial and requires a change in attitudes.)

- Are there any policies and programmes to decrease the burden of unpaid work on women and girls, e.g. flexible financing, mobile crèches, village-based child care? Research shows that there are immediate pay-offs from public financing of child care.

### 3. Equalising property rights: land and housing

- Do women have equal *legal* rights to ownership and inheritance? Do they have *de facto* rights or do norms, customs, lack of information or lack of incentives prevent them from exercising these rights?
- Are there customary laws in conflict with statutory laws?
- Are there other problems in access to land, e.g. lack of ID, ownership documents, etc. that can be solved with a different approach, e.g. land certificates with pictures, wills, marriage registration, oral and holographic wills.
- Housing rights in urban areas.

### 4. Labour market rights – decent employment

- What are the obstacles to women's equal participation on the labour market and equal pay? E.g. employers' views that men need jobs more as they are breadwinners, negative views about women's ability to assume leadership positions, segregated labour market, sexual harassment, wage discrimination.
- What opportunities are there for reconciliation of family and work obligations; child care, flexible hours, part-time, parental leave etc.?
- Are these problems addressed by existing unions or worker's rights movements?
- Migrant workers tend to be more vulnerable; are they covered by an existing rights framework?

### 5. From microcredit to inclusive financial systems

- Microfinance tends to be a form of financing that is particularly important for women. Are financial services such as credit, savings and insurance available?
- Are there entrepreneurship programmes targeted at women? Are these designed to address needs beyond technical skills training?
- Are there opportunities for taking advantage of women's expanded roles during post-conflict situations in the reconstruction phase?
- Does the tax system have gendered implications?

### 6. Gender-aware social protection

- Is there a "minimal social floor" in place, e.g. a social support system that is not tied to employment and that guarantees access to the most basic means in the event of loss of income and to child benefits, disability benefits, old-age pensions?
- Are women's reproductive responsibilities recognised in public social protection systems in terms of access to maternity health care, paid maternity leave? Such systems mitigate a source of great insecurity. Are there community-based insurance schemes?
- Are pension reforms considering the effect of these on women who are outside the formal labour market to a greater extent than the effect on men? Reforms that make a closer link between contribution and benefit leave a large group of women without security in old age unless this is catered for in the reform process.

### 7. Aid Effectiveness

- How is the aid architecture addressing WEE?

- Efficiency and accountability to goals on gender equality, e.g. gender-responsive budget processes, MTEF, etc.
- Macro-economic models must respond to the unpaid care economy.
- Gender awareness (WEE-specific) in joint donor dialogue agendas.
- Gender awareness (WEE-specific) in joint donor monitoring frameworks.

### 8. Agriculture sector

Most women in poor countries are dependent on the agricultural sector

- Are women being reached by extension services? Are there female extension officers?
- Do extension services provide advice in production for which women tend to be responsible? Are both on-farm and off-farm products included?
- Are women equally represented in farmers' organisations? Do they hold decision-making positions?
- Do agricultural programmes address the specific problems that arise out of the gendered division of labour? Do they challenge the division of labour?
- Do they provide solutions for child care for women who are engaged in off-farm production?
- Are financing schemes available for women in agriculture?

## Annex 2: Example of priority list from Kosovo

Priority	Programme	Cost	Support	Positive aspects	Negative aspects
+	Forestry programme	Low	Develop component	-Can influence women's situation in a sector that is male-dominated -Can have influence on a large group of women that are active/can be active in forestry -Little effort for results	The program is currently only targeting 9 female students Effects are long-term
+++	Property Agency	High	New component/ Programme	Land and property rights is very important and can have an impact on many women	Greater intervention is required
+++	Education	Part of new project	-	Education system is instrumental in changing norms and attitudes. Easy to apply – knowledge and experience exist	Long before effects can be seen.
++	Entrepreneurship programmes for women	High	New progr. or part of PSD progr.	Short-term effect Important when the labour market is weak Major potential	Sustainability
+++	Dialogue and gender coordination	Low	Support to develop dialogue strategy	Very important for incorporation of gender issues into the main strategic discussions and development efforts	

The first column, Priority, states the priority that the proposed intervention has for the Country Team in terms of the potential impact it has on women's economic empowerment.