EMBEDDING INEQUALITY REDUCTION INTO YOUR COUNTRY STRATEGY

THE MULTIDIMENSIONAL INEQUALITY FRAMEWORK: THE OXFAM TOOLKIT

OXFAM

No two country teams are in exactly the same position in terms of how they are tackling inequalities. Some may have a well-researched national inequality report and an active national campaign. Others may be campaigning on inequality-related themes, but with no defined inequality strategy or targeted inequality research. The approach taken here is to provide guidance for reflections that can be used flexibly in your planning workshops.

EMBEDDING INEQUALITY REDUCTION INTO YOUR OXFAM COUNTRY STRATEGY

What is this about?

Following the new Oxfam Strategic Plan (OSP) 2020-2030, Oxfam teams will be called upon to develop new country strategies. Given the broad institutional commitment *'to fight inequality to beat poverty'*, increasingly teams are interested in inequality reduction as the central framing around which new country strategies can be developed. This short guide has been designed to assist in this task. It will help you ensure that the concept of tackling inequalities is embedded throughout all aspects of your new Oxfam Country Strategy (OCS). A simple 3-step process is recommended. This can be carried out in conjunction with Oxfam staff, partners and external experts as relevant.

This short guide will help you ensure that the concept of tackling inequalities is embedded throughout all aspects of your new Oxfam Country Strategy

Step 1 Context Analysis: *how unequal is your country and why?*

Step 2: Programme Review: *how is your current programme tackling inequalities?*

Step 3: Strategy Formulation: *embedding inequality reduction into your new country strategy*

No two country teams are in exactly the same position in terms of how they are tackling inequalities. Some may have a well-researched national inequality report and an active national campaign. Others may be campaigning on inequality-related themes, but with no defined inequality strategy or targeted inequality research. The approach taken here is to provide guidance for reflections that can be used flexibly in your planning workshops. Simply select those aspects that are most relevant and useful in your case. There are also a number of other tools available to guide countries in strategic planning processes that may also be useful to review in conjunction with this document.

Step 1 - Context Analysis: how unequal is your country, and why?

A country context analysis is a standard feature of Oxfam countries' strategic planning processes. It is equally important for teams interested in embedding inequality reduction in their strategies.

The **first stage** in your context analysis will allow teams to establish a common understanding of inequalities in the country and will form the basis of later planning and prioritisation exercises.

Key questions that country teams should ultimately seek to answer in their context analysis include the following:

- What does economic inequality look like in your country?
- How are economic, social and political inequalities interrelated?
- Which groups and territories appear to be the most negatively affected by a range of inequalities? And which appear to be mostly benefited? Why?
- How do inequalities affect women and girls?
- What trends are you observing in relation to inequalities? What is improving? What is worsening?
- What inequalities would you rank as being of the highest concern, and why?
- Where do you lack critical information that is a barrier to this type of analysis?

These are not straightforward questions to answer. While some countries will have access to an impressive body of research and/or readily available data, others may not have in-depth knowledge of the nature of inequalities in many areas. Oxfam has a number of tools to help build understanding in this area. Most relevant for analysis is the **Multidimensional Inequality Framework (MIF)**, a new tool developed in a collaboration between researchers at the Centre for Analysis of Social Exclusion at the London School of Economics (LSE), the School of Oriental and African Studies (SOAS) and Oxfam.

There are the seven domains of life used in Oxfam's MIF, as you can see in the graph below. Your team may want to choose some, or all, of these as a starting point for their contextual analysis, seeking to answer the key questions listed above. For more information check out 'What is the MIF' and 'Learn How to Use It' in Oxfam's new online toolkit, available at inequalitytoolkit.org. Please note that, in the Oxfam's MIF, each domain contains a number of sub-domains and suggested indicators, which will help you sharpen the focus of your analysis. You can customise your analysis by using the 'Build your own MIF' tool available in the website.

Finally, where knowledge gaps are identified, these should be noted and carried forward to **Steps 2 and 3.** Commitments to researching further the nature and drivers of inequalities are likely to be an element of many countries' strategies over the next period.

The **second stage** of the context analysis looks at the drivers of inequalities. Teams may want to dedicate more time to this aspect given the importance this exercise has for programmatic choices later. The aim of conducting this analysis is to identify the 'major drivers' of inequalities in your country. This does not mean you would automatically work on all of these. That would depend on feasibility, risk, resources and other aspects that are covered later during planning **(Step 3).**

The drivers' analysis builds on the previous step. You should explore together as a team the multiple drivers of the inequalities mapped in the first exercise. This could be done through a simple participatory exercise with staff, partners and other stakeholders identifying together drivers for each category of inequality. Presenting these visually is useful and can set the scene for a discussion of overlaps (where, for example, national budget expenditures are identified as driving economic, social and gender inequalities). This will help you identify 'major drivers' and help teams establish a ranking of the most important drivers in terms of impact on inequalities.

Useful inputs to this analysis can be found in Oxfam's inequality online toolkit. Explore the **'Analysing Drivers'** section of the online toolkit. There you can find a brief description of 'national drivers' across the 'seven domains of life' listed earlier, therefore encompassing many themes Oxfam teams are interested in. A brief description of drivers is provided in each sub-section, followed by a chart summarising some important driver categories that could be explored in your context analysis. These driver categories may or may not be relevant in your country. One option is to assess their relevance in a participatory exercise, with the most relevant drivers identified and unpacked further as part of your reflection. A conclusion of your driver analysis might be that a captured democracy is a key, underlying driver that explains the existence – and persistence – of inequalities across many areas of life. This would provide strong rationale to give the aspect of political capture specific attention in the strategy formulation stage. For tools on political capture, you can check **'The capture phenomenon: unmasking power'**, which provides a specific methodology to understand how political captures operates.

Step 2: Programme Review – how is your current programme tackling inequalities?

The second step will allow you to assess your progress to date with regard to tackling the various forms of inequality in your country. It begins by looking back at the key documents formulated to guide your current country and programme strategies. After looking at the commitments made, it is important to review programmes, activities and research to assess the nature of achievements in this area.

Guided reflection to review key commitments made over the last period:

- Was inequality reduction central to the vision and goal of the existing country strategy when it was created?
- To what extent was inequality reduction covered by the country change objectives and the theory of change created?
- Was inequality reduction covered by any campaign objectives developed in this period?
- Did the MEL plan include any key indicators related to inequality levels and/or inequality reduction strategies?

This might be a short exercise, or it might require a lot of team discussion to reach consensus on the nature of the commitment made to inequality reduction under the existing country strategy. Some teams may want to do a simple scoring exercise using these questions to quickly survey the level of agreement.

Also, key is to assess progress made in terms of programming and the actual outcomes and impact of your work. This should include all programmes, projects and campaigning activities, as well as any special research projects. Key questions to ask are as follows:

- What are your key programmes and activities aimed at tackling inequalities?
- What have you accomplished and what strategies/activities have been key to achieving success?
- Considering progress to date, and the context analysis carried out in step 1, what would you identify as the main programmatic gaps? For instance, do your programmes help tackle the right drivers of inequality? Do your programmes help tackle gender-based inequalities?
- How would you assess your partner portfolio? Do partners have a vision for inequality reduction within their mandate? Are they well-placed to influence inequality debates?
- Considering research conducted - and your context analysis - do you feel your research is up to date and comprehensive enough? What are the biggest research gaps?

This assessment should enable the team to establish consensus on whether the commitment to inequality reduction has been sufficient, where progress has been made, and where more could be done.

Step 3 - Strategy Formulation: embedding inequality reduction into your new country strategy

What to take action on?

Your analysis so far will have enabled you to establish agreement around the most concerning inequalities in society as well as to identify the multiple drivers of these inequalities. No country programme can tackle all of the drivers of inequalities across all of these areas and some decisions need to be made to focus your programming. The visual below presents a simple tool to guide your decision-making.

Applying this tool can help guide your programming decisions as you try to choose which drivers of inequality to prioritise. If you would like more information on assessing these aspects, some key questions on these are provided in the Oxfam's MIF online toolkit to help guide discussions. See **'What to take action on?'** in the **Learn How to Use It** section.

Narrowing down your programmatic focus

When seeking to narrow down your specific focus, the **Country Inequality Guide** can be a great resource to use. For example, for a country seeking to get involved in progressive taxation, the guide provides information on areas to focus on, specialist research options and strategies that can be adopted in working with CSOs, governments and donors in this area. Similar practical guidance is available in this guide in relation to research and programming activities in a number of other areas, including public spending on public services, social protection, work and wages, or inequalities in access to land and other productive assets.

Exploring links to Global Programmes for the reduction of inequalities

By this point you will have agreed the drivers you want to work on and you will have made a number of strategic programmatic choices. Oxfam is currently working to develop Global Programmes to tackle critical and typical drivers of inequality in areas where we have specific expertise and added value. You may want to consider if being part of these global initiatives can provide value to your country work. There are three Global Programes for you to consider:

- Fiscal Accountability for Inequality Reduction
- Women's Rights to Dignified Work
- Climate Change

Options to develop new global programmatic initiatives on Unpaid Care Work, and on Equitable management of natural resources are currently being explored.

Finally, remember that unmasking political capture and protecting and expanding civic space are critical avenues for inequality reduction. These should be integrated in all our programmes. To help you, you can check Oxfam's methodology on Political Capture, and Oxfam's strategy on Civic Space.

How to bring about change?

The next challenge is to determine <u>how</u> you can effectively bring about change. There is no specific formula that can be offered here as guidance. However, given the causes of inequality are deeply embedded in societal systems, power relations, norms and culture, critical aspects that teams may want to consider include both *changing the narrative* and *changing the rules*. Changing the narrative aims at changing the prevailing norms, beliefs, attitudes and practices that sustain the current economic model and have resulted in a widespread tolerance of inequalities and discrimination. Changing the rules refers to changing the policies and regulations that shape our societies and determine the patterns of inequality experienced. Whether, and how, you work on these aspects will be highly dependent on the context in which you operate, and your understanding of how change happens in your society. The following questions are a sample reflection guide that might be useful at this point to help you think more about your programming and influencing strategy:

Changing the Narrative	Changing the Rules
Should changing the narrative be an element of your strategy for inequality reduction? What more do you have to do in your country context to prepare for, and effectively work in this area? • What are the dominant narratives in society in relation to inequality? How	*What is the team's assessment of the policy change space in relation to the thematic priorities you have identified for action regarding inequality?* • Have the problems been recognised or is there space to win recognition of the problem/s with an appropriate coalition of players. Eg. Fight Inequality Alliance??

- do these narratives relate to social norms, ideas, beliefs and practices?
- How much of a barrier do these represent to change?
- What is the public's understanding of the level and nature of inequalities in society? Does Oxfam know enough about public opinion in this area, or should additional thorough research be conducted?
- What are the public perceptions of solutions that will reduce inequality? How do the dominant narratives determine the space for equity-enhancing policy change?
- Could Oxfam develop a unifying theme – that goes beyond single issues – and unites progressive organisations to advance a new narrative in society? What space is there for Oxfam to play a catalyst role in this area and what other organisations should be involved?
- Is the Oxfam team able to test new frames and narratives? What expertise and resources are needed to reinforce (or embark on new) work in this area?
- What experience does Oxfam have developing and equipping messengers? Is analysis, preparation and investment in this area sufficient? What more could be done to broaden and improve the messenger strategy?
- Does Oxfam have the right relationships with alternative media outlets and creative and cultural organisations? What new connections could be made?
- Is Oxfam investing sufficiently in communications capacities with its different types of levels of partners? What more should be done in this area?

- Is Oxfam in a position to identify and advocate for the most appropriate options and policy solutions? What more policy research is called for?
- Has the team conducted a power mapping and power analysis to map the political landscape? Is there sufficient space to advance some policy proposals for inequality reduction or are opposing interests too strong?
- Could the policy change/s envisaged cause any unintended harm to any group in society? Are aspects of gender sufficiently addressed in the policy solutions and proposals on which Oxfam would like to focus?
- Is Oxfam already in the right coalitions and alliances? What more needs to be done to build the right alliances for policy change?
- Is citizen-centred advocacy an existing or potential focus? Would this enhance the space for policy change? What more needs to be done to empower citizen leaders and build new forms of collective citizen organisations, particularly including those led by women and minority and excluded groups?
- Are there any small policy wins that could be achieved quickly to build momentum for reform in relation to inequality reduction?
- Should Oxfam include data advocacy in its advocacy on inequalities? What data gaps and areas (e.g. disaggregation of data) most need attention? What focus of data advocacy would be most relevant?

Could a mixed strategy, emphasizing narrative and policy change together enable you to create an overarching narrative on tackling inequality, while also calling for a series of equity-enhancing policy changes in a number of areas?

Answering these questions will not lead you directly to an action plan. However, exploring these important aspects as a team will help you develop consensus about where Oxfam's investment and concerted actions could be most valuable. To access more practical tips that can help guide programmatic activities in relation to changing the narrative and policies, see the **'Taking Action'** section of the inequality toolkit.

Ensuring inequality is embedded into your MEAL plan

It is also important to ensure that the concept of inequality is embedded into your Monitoring, Evaluation and Learning (MEL) plan. Some of the indicators of progress for your new OCS should be related to inequality reduction and specifically to the drivers of inequalities you have prioritised. This is relevant for all programmes and projects where indicators relating to inequality will help you measure your success consistently in this area.

Complementing already existing CAMSA methodologies and tools, the Oxfam's online toolkit provides some potential indicators to monitor the drivers of inequalities: check out the '**Analysing Drivers**' section in the online toolkit. Here you can explore - by driver category – suggested research questions for each topic as well as potential indicators to monitor these drivers.

When formulating your key indicators, discuss which will be most useful to assess your progress in tackling the drivers of inequality you have prioritised. Make sure it is clear when and how information will be collected. Given some of these indicators would require specific research efforts to create baselines and gather follow-up information, the number of indicators of this type should be kept to a manageable level with proposed sources clear at the outset.

Last but not least, make sure you identify 3-4 key learning questions for you to answer through the next strategy cycle.

Additional programming ideas to consider for the next period

Teams that have already made some progress embedding inequality reduction into their programmes and strategies may be in a position to consider some of the following activities in their next strategic plan period:

- Publish a powerful country inequality report
- Release a special, thematic inequality report as a stand-alone piece of research or as part of a series of inequality reports, focusing on inequalities in one specific domain of life.
- Design a special research project around some of the major drivers of inequalities in your country. Use the MIF and **Oxfam's online toolkit** to explore potential research questions to enable an in-depth investigation of the drivers you are interested in.
- Develop a special initiative around the problem of political capture using Oxfam's robust framework of analysis developed specifically around this aspect.
- Consider opportunities for **data advocacy** around inequality, particularly in light of key inequality data gaps and any limitations with data disaggregation in your country.
- Consider doing your own primary surveys to get the exact data you need and applying the disaggregation you want to spotlight inequalities or design a qualitative research project to respond to gaps identified. Investigate applying for a special research grants for work in this area in conjunction with a credible academic partner.
- Consider the creation of 'inequality diaries' to record people's lived experiences of inequality in powerful ways. While fulfilling an important research function, this activity also has vital storytelling aspects that can be useful to support Oxfam's communication and messaging functions.
- Consider gathering 'impact stories' to showcase your achievements and share your lessons learned in the fight against inequalities. Remember your stories can be shared via the '**Get Inspired**' section of Oxfam's online toolkit.

If you would like to make contributions to this guide, please contact Alex Prats at Oxfam Intermon:
alex.prats@oxfam.org

OXFAM

Oxfam is an international confederation of 20 organizations networked together in more than 90 countries, as part of a global movement for change, to build a future free from the injustice of poverty. Please write to any of the agencies for further information, or visit www.oxfam.org

Oxfam America (www.oxfamamerica.org)
Oxfam Alemania (www.oxfam.de)
Oxfam Australia (www.oxfam.org.au)
Oxfam-in-Belgium (www.oxfamsol.be)
Oxfam Brasil (www.oxfam.org.br)
Oxfam Canadá (www.oxfam.ca)
Oxfam France (www.oxfamfrance.org)
Oxfam Germany (www.oxfam.org.de)
Oxfam GB (www.oxfam.org.uk)
Oxfam Hong Kong (www.oxfam.org.hk)
Oxfam IBIS (Denmark, http://oxfamibis.dk/)
Oxfam India (www.oxfamindia.org)
Oxfam Intermón (www.oxfamintermón.org) Oxfam Ireland (www.oxfamireland.org)
Oxfam Italy (www.oxfamitalia.org)