Gender Equality in the Off-Grid Solar Sector

EXECUTIVE SUMMARY

Women are essential for the off-grid solar (OGS) sector's ability to fully embrace diversity and inclusivity to achieve universal energy access goals. The industry's limited gender inclusion across the customer base, workforce and leadership hinders the sector's full potential for impact and achieving SDG 7 before 2030.

In this vein, GOGLA and the World Bank Group (with support from the Energy Sector Management Assistance Program - ESMAP) are seeking to better understand the realities and resources that exist across the sector, among consumers, and within the workforce in an effort to promote an inclusive agenda for the sector. In a recent survey of women working in the OGS sector, we sought to examine the gender gaps that currently exist within the OGS sector and avenues to close the gap. In particular, the questions surveyed i) initiatives and products supporting gender equality; ii) leadership, workforce, and customer base; iii) professional networks for women with respect to individual and organizational participation.

The survey was distributed via email and social media platforms and all responses were voluntary and anonymous. Fifty five individuals from 20 countries and 37 organizations participated in this survey. .

DISCLAIMER: When measured across the number of women, organizations, and countries that participate in the sector, we note that these response rates are particularly low and better methods are necessary for collecting data and engaging women. Many of the results in the responses could be affected by respondent biases. Data from a wider number of companies is needed to understand the true picture.

The results of this survey will help inform the creation of multiple gender inclusion activities by GOGLA and the World Bank Group/ESMAP, which could include: A professional OGS network for women, working group for gender inclusion champions, a toolkit for practitioners on how to advance gender equalities, and the development of industry-standards and market insights to evaluate gender inclusion within the sector.

Key Findings

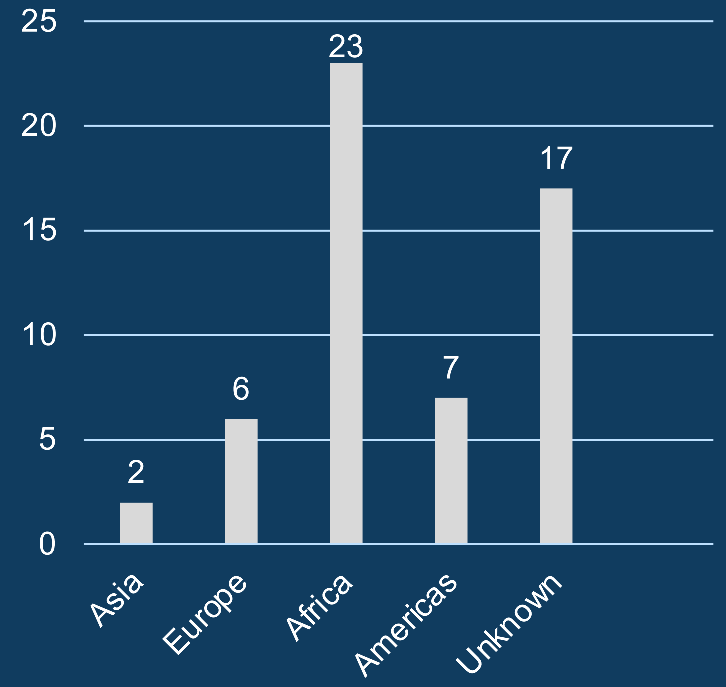
In the off-grid solar sector, there are several barriers to increasing gender inclusion across workforce, leadership and customer base. These include financial and cultural constraints, fundraising barriers and limited collection of sex-disaggregated data.

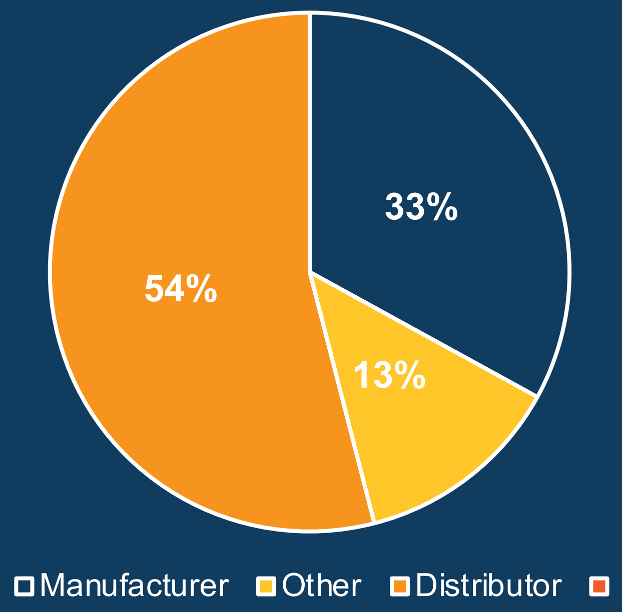
We are only just starting to understand the sector's performance. More market insights are needed to shed more light on gender inclusion across investment, leadership, workforce and consumers; and to evaluate the impact of gender-based initiatives on business performance.

There are currently no standards within the sector related to gender inclusion. There is therefore a need to develop standards and guidelines, disseminate (existing) tools, and convene key stakeholders to further advance gender inclusion within the sector.

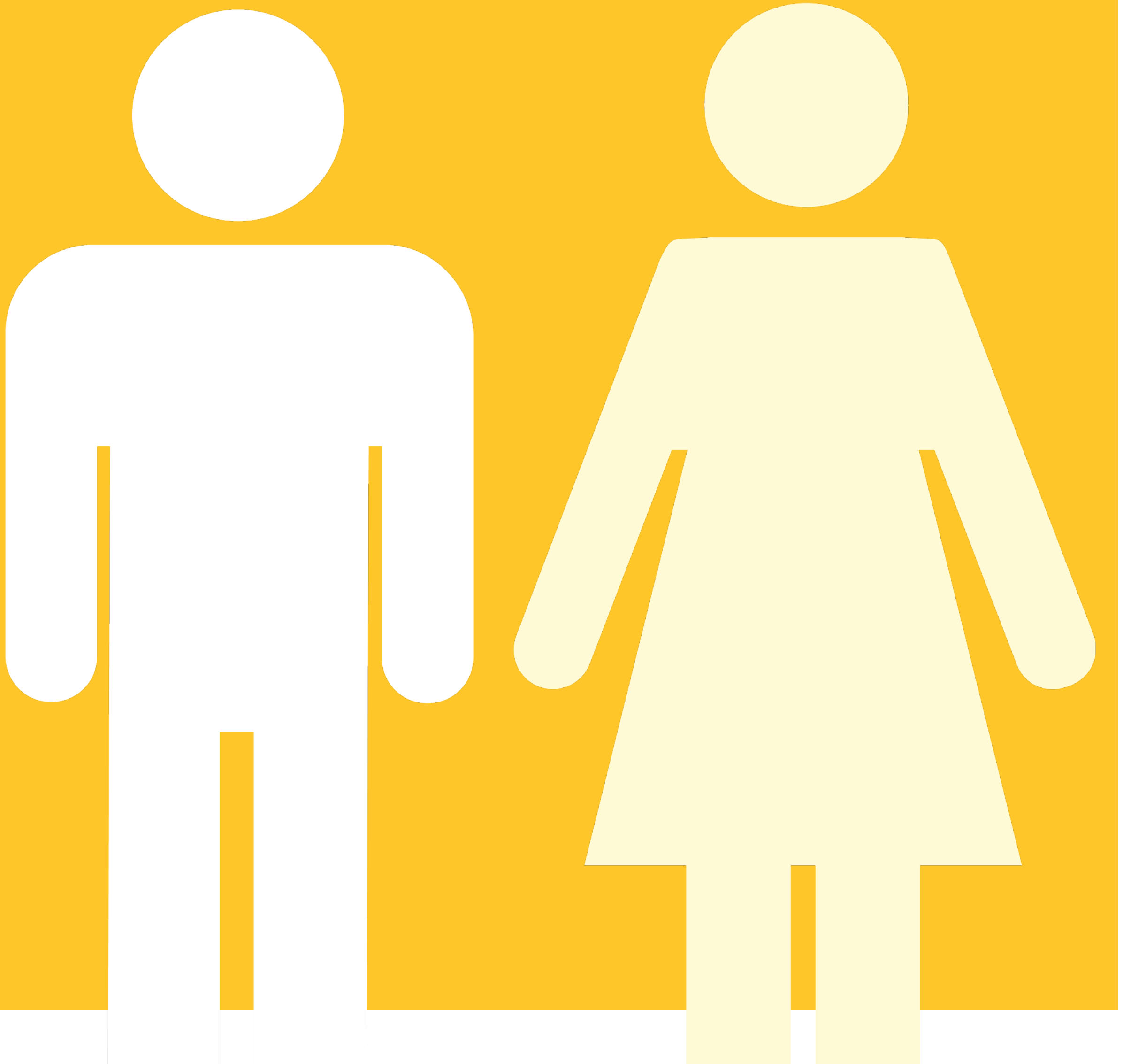
Respondent Demographics

55 individuals, from 37 organizations/companies, from 20 different countries





State of gender inclusion in respondent companies



Leadership

Number of women in leadership positions of respondent companies

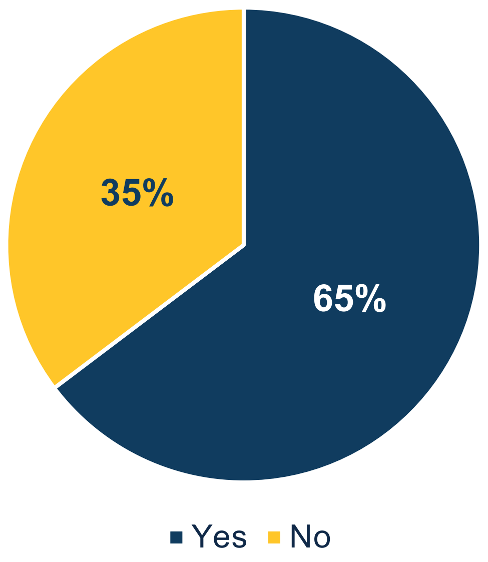
34% Of board members are female

37% Of senior leadership positions are held by women

49% Of companies within the sample were founded by a women or have a female CEO

Leadership

Fundraising barriers



Almost **two thirds** of female founders experience additional barriers or biases when fundraising in comparison to their male peers. Reducing these barriers may **enhance overall investment flows.**

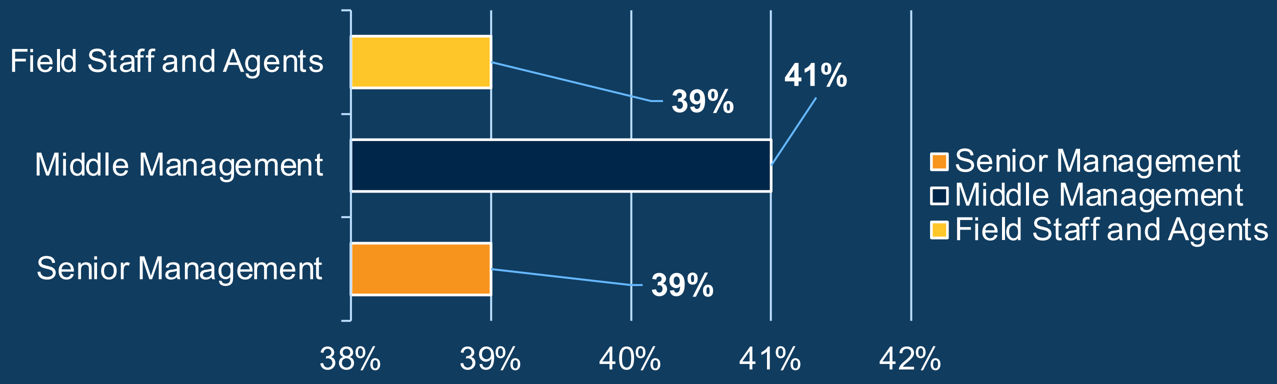
"I do not have the same connections to funders as male counterparts"

"I found it very difficult to raise funds due to segregation that is in the society of men"

"Investors asked me whether [I] plan to have children"

Workforce

State of women's participation at different levels of workforce among respondent companies

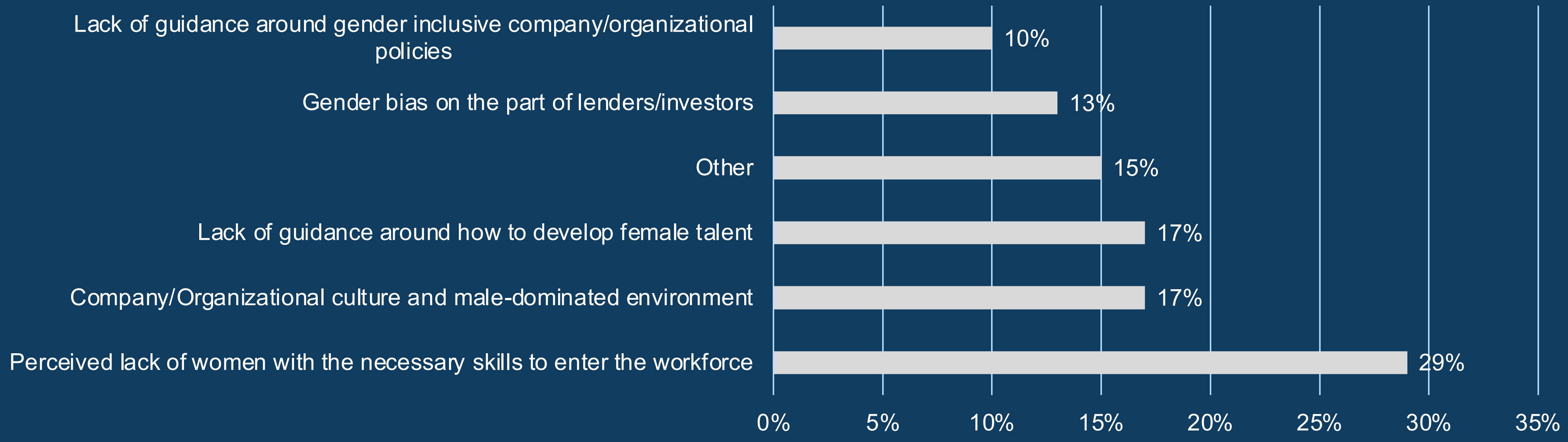


N.B. Average excludes companies with 100% female staff as this may distort the overall picture. The average for higher, middle and field staff and sales agents would otherwise be 40, 43, 41 % respectively.

- **Compared to related studies, the numbers are considered relatively high, as research from IRENA and GOGLA show a 32% and 27% female share respectively. This is likely due to respondent bias within the survey results.**
- **More specifically, results from Value for Women show 17% for female middle management, 14% of positions below middle management, and 22% of female sales force.**
- **Field staff and sales agents are likely lower due to the lack of security for female sales agents, next to cultural norms and the nature of the job. Enhancing their participation as a sales agent may enhance sales performance.**

Constraints

Perceived constraints to improving gender inclusion in leadership and workforce



Respondents perceived the following constraints to advancing gender inclusion across their organization: **skills to enter the workforce**, lack of guidance around **how to develop talent**, and **male-dominated environment**.

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Workforce Constraints

Additional perceived constraints to enhance gender inclusion in leadership and workforce

Lack of security
There is a lack of security for women working within the field.

Culture
In some cultures, women are less willing or able to follow technical trainings, which hampers their participation.

Delayed Progression
Delayed progression of younger women into management roles.

Unable to offer competitive rates
Difficult to hire women at rates that are typical for social ventures in places where they are high in demand.

Financial constraints
Financial constraints to train women in solar technical skills.

Low empowerment
Low women empowerment, mainly through finance and education.

Customer

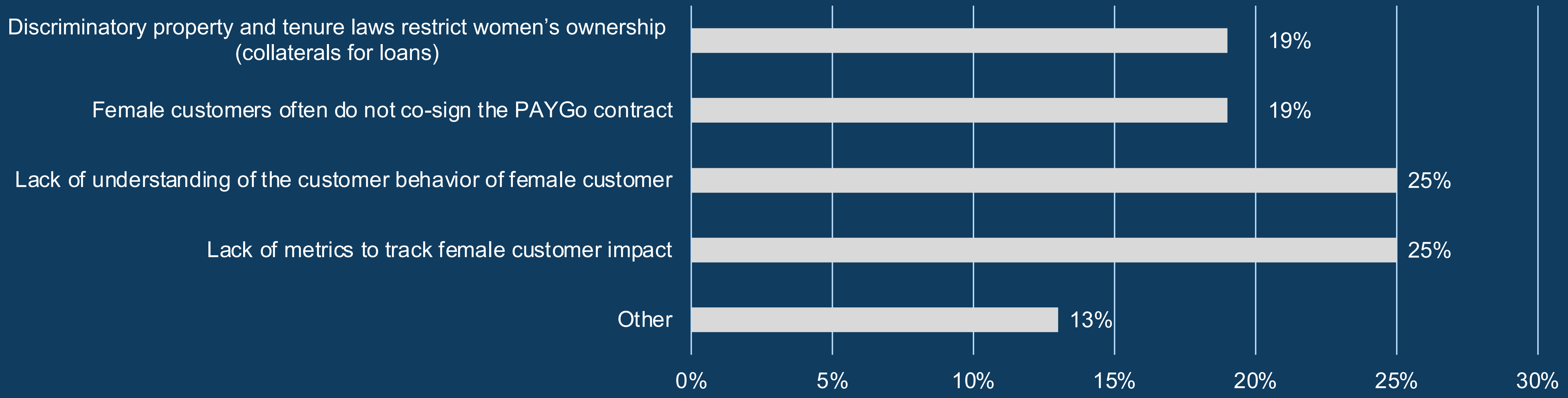
State of gender inclusion across the customer base of respondent companies

40% of respondent companies collecting sex-disaggregated customer data. About 45% of their customers are female.

This is higher than reported in 60 Decibels Energy Benchmark, which found that 32% of customers are women. This may indicate that companies collecting sex-disaggregated data are more able to attract women customers.” There is an opportunity to improve practices within the sector with regards to collecting sex-disaggregated data. This may improve sales performance (e.g. tailored products) and enhance credit risk management (e.g., tailored payment plans).

Constraints

Perceived constraints to enhance gender inclusion across the customer base

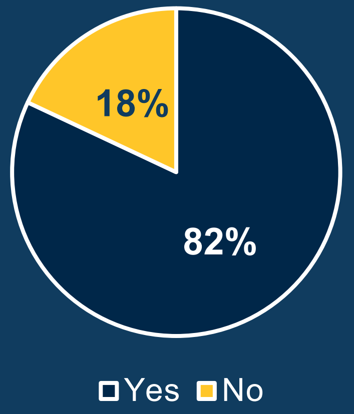


Respondents perceived the following constraints to advancing gender inclusion across their customer base: **the lack of understanding of female customer behaviour and a lack of metrics to track female customer impact.**
NOTE: This relates to the also low percentage (40%) of companies that are collecting the data.

Existing activities, programs and tools

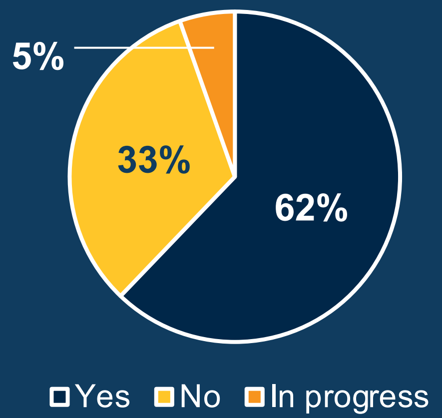
Gender sensitive initiatives, practices and/or policies

Organizational, operational, and consumer-facing policies



82% of respondent companies have at least one gender sensitive initiative, practice, and/or policy in place supporting internal staffing and/or consumer-facing operations

Almost two thirds of respondent companies have a formal target in place for new female hires. The target ranges from 33 to 60% of women employees



Type of gender sensitive initiatives, practices, and policies reported by respondents include:

- Sexual harassment policy
- Hiring policies and staff diversity targets
- Studies and other data collections
- Trainings
- Gender focussed policies and plans

Perceived impact of gender sensitive initiatives, policies and practices

Participation	33% noticed an increase in female participation
Ownership	17% noticed that women perceived a higher sense of ownership and empowerment
Leadership	10% have seen an increase in women taking on leadership positions
Business development	7% perceived higher business development
Investment	5% noticed an increase in investments towards women led business

Existing gender focussed tools and programs

Tools

The Code of Conduct for addressing sexual violence

WEP Gender Gap Analysis Tool

Gender Scoring Tool

Gender Mainstreaming Toolkit

Programs

Value for Women Program – Shell Foundation

Girl Move Academy

Remote Energy Women's Program

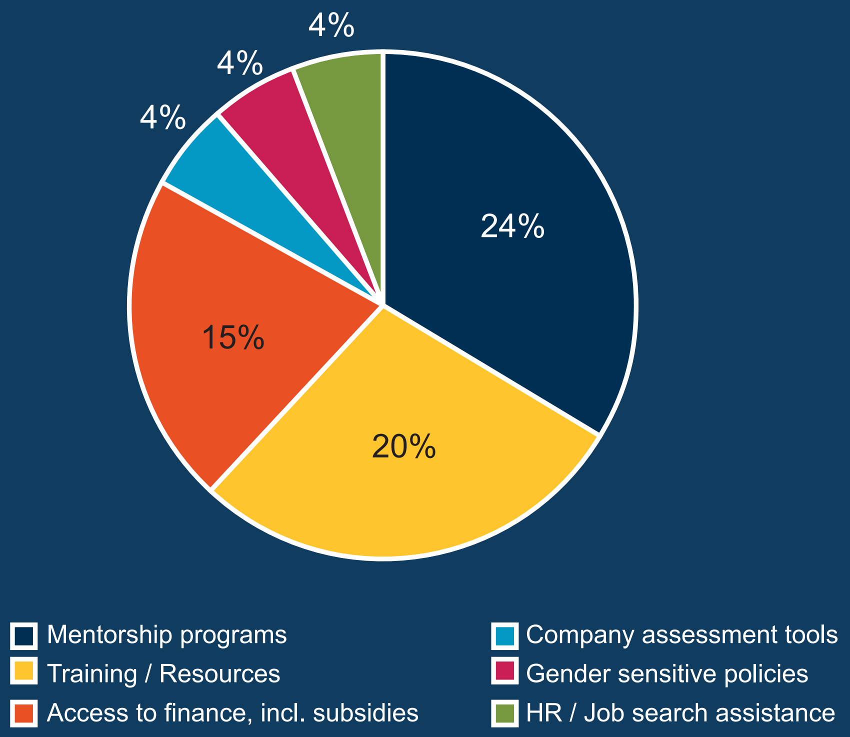
Women in Energy Program by USAID

NOTE: These are a few of the examples shared by participants, this selection is not exclusive.

Perceived gaps in initiatives & products to support gender equality

Tools & Guidance

Perceived lack of product and tools/guidance that could contribute to enhanced female participation



Desired initiatives

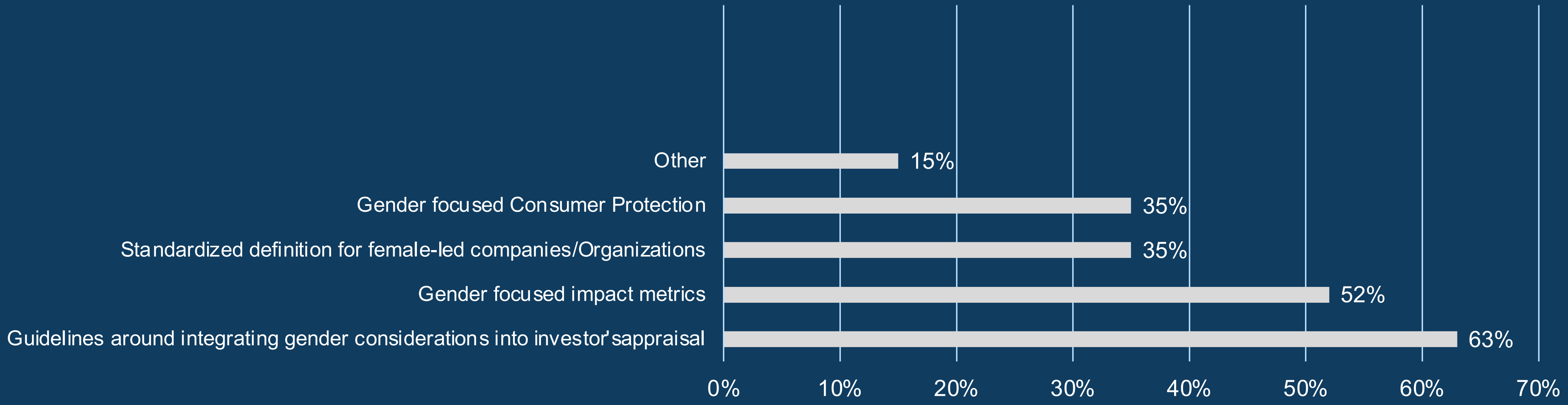
Highest need for **mentorship programs (24%)** and greater access to **training and resources (20%)**

Awareness of other initiatives

42% are aware of other supportive tools, knowledge products or initiatives that should be leveraged in the wider sector

Standards & Guidelines

Standards & guidelines that respondents perceived could support gender inclusion

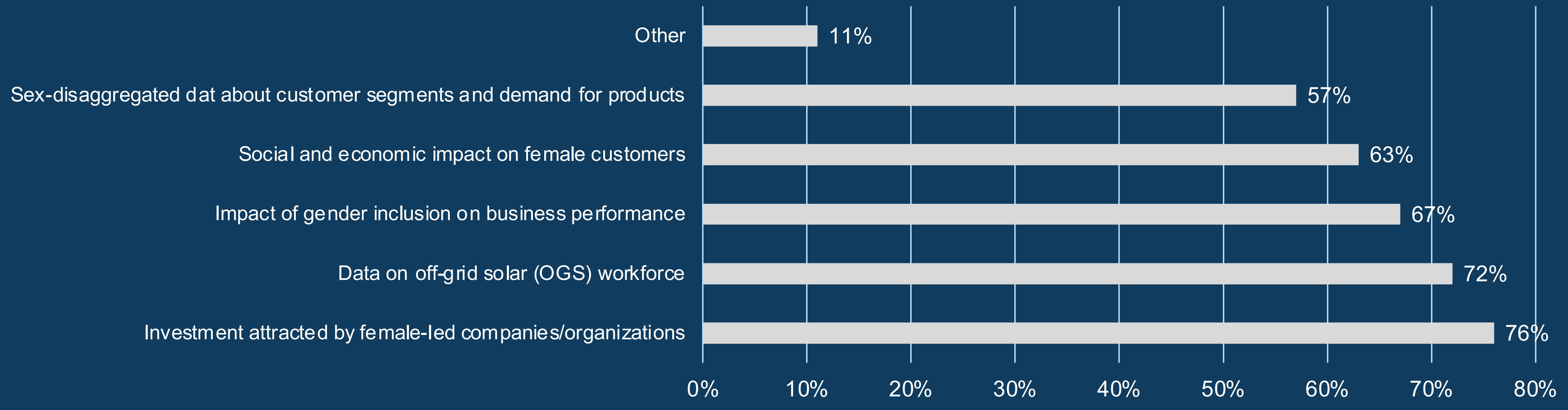


Company policies and best practices to advance women's participation are most needed. Another significant need is to provide guidelines around integrating **gender considerations** into **investors investment processes.**

Respondents further mentioned a need **for additional care for the families**, means of **understanding and addressing better protection and acknowledgement of women's achievements and addressing female customer needs.**

Market Insights

Market insights that are currently missing and perceived to be needed for the sector



Top 3 market insights that are needed include **investment attracted** by female-led organizations, on the OGS **workforce**, and the **impact** of gender inclusion **on business performance.**

Market Insights

Other market insights that are currently missing and perceived to be needed for the sector

HR Data

Leadership positions

Retention

Intersectional data

HR Data
Data on perceived barriers concerning job application, hiring women and participation in Technical and Vocational Education and Training.

Retention
Retention in sector based on sex-disaggregated data or other identity factors.

Leadership
Inclusion of women in major decision-making and leadership positions in the sector.

Intersectional data
Including socio-economic level, ethnicity, race, age etc. next to sec-disaggregated data.

Needed initiatives

Additional activities that respondents would like to see in the sector

Targets

Financial Support

Education

Involvement policy designs

Female centric design

Targets
Targets need to be agreed upon, and commitments need to be secured and enforced.

Financial support
Women led businesses need financial support to grow.

Education
Free energy courses for young ladies and business education.

Involvement policy design
Women should be more involved in policy design to increase awareness and understanding.

Female centric design
Customer centred needs workshops, related to product and initiative creation, delivery and review.

Most desired additional activities for the sector are **networking events** and **promoting the OGS sector to young women.** Next to that, there is a need for **mentoring opportunities, raising women's visibility, and developing standards and guidelines**.

Building a Community of Practitioners within the OGS Sector

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CONCLUSIONS/ WHAT'S NEXT?

Using these data results, how do we build a community of practitioners within the OG Sector? The responses told us – not surprisingly – that women in OGS are particularly underrepresented in middle and senior management roles and largely invisible at industry events, as you yourself may have noticed at the last forum you attended. Despite comprising 48 percent of the global labor force, women account for only 22 percent of workers in the oil and gas sector and 32 percent in renewables, of which the OGS sector is a sub-set.

It's clear that we need more and better sex-aggregated data collection. The collection and analysis of sex-disaggregated data on product and service provision and customer segmentation is key to designing better interventions. In order to learn more about market segments related to men and women (including consumers in the last mile or at the bottom of the pyramid), and capitalize on the purchasing power of women, it is advisable that market research on needs and interests be differentiated by gender; and that research be conducted on gender norms to understand how to communicate to women consumers, and adapt in different contexts. In addition, electric companies and utilities should keep records of their staff by disaggregating information by sex, tracking their attrition, retention and promotion.

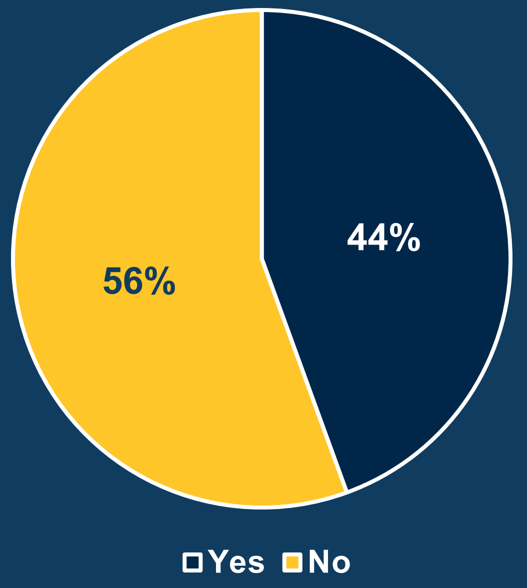
Women in the developing world and emerging markets, both governments and private sector, hold a smaller proportion of leadership roles and visibility. With the right support, however, we can advance the talent and skill that women in this sector possess.

We would like to build on your progress, consolidate these efforts into a network, and advocate for OGS women and provide a space to address the barriers they face in the OGS workplace. When we asked about existing networks and initiatives in the sector, here's what we heard…

Industry contribution

Current participation of respondent companies in gender related networks or initiatives

% of respondent companies and organizations that are a member of an existing network or initiative.



Examples

Existing Gender Networks & Initiatives

Most useful components of existing gender networks and initiatives

Networking	Networking is perceived as the most useful component (25%)
Training	Training and technical assistance as the most useful component (13%)
Metrics	Knowledge on gender focussed benchmarks and metrics is considered useful (13%)
Development	13% appreciated the opportunities for business and capacity development
Mentoring	Mentoring was perceived as most useful component by a minority of respondents (6%)

Gender Inclusion Networks and Initiatives

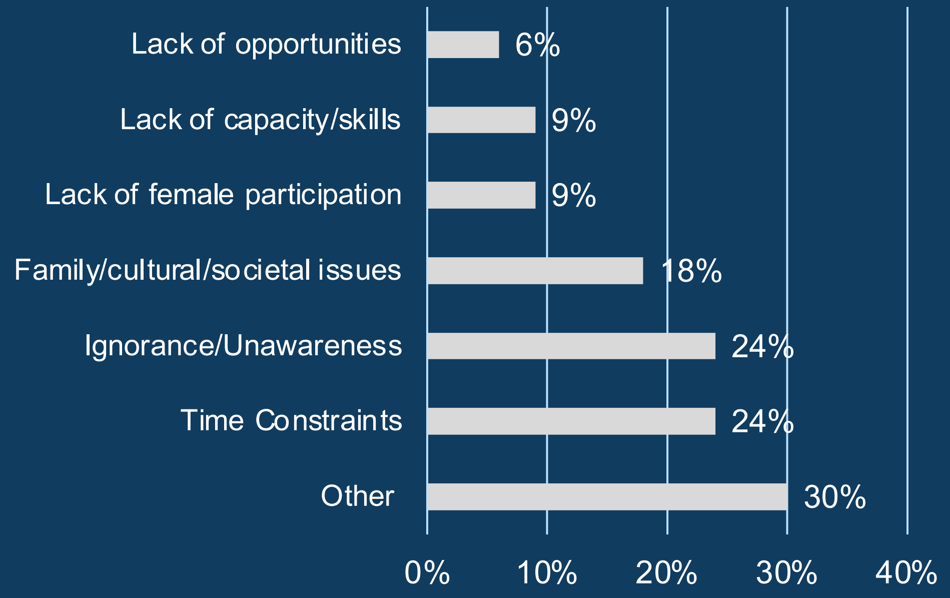
Aspirational participation in networks and activities

93%

Would like to join a working group to advance gender inclusion.

63%

Would like to play a foundational role in a network or initiative.



Perceived constraints women face when joining or forming a professional network, include time, awareness and access.

How can we address these barriers?

Please contact us to join in this effort

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