



Gender-Sensitive Budgeting

An Overview

This Presentation

- What is Gender-Sensitive Budgeting (GSB) ?
- Why is it important?
- Who has already done it?
- What lessons have we learnt?



What is GSB?



The Integration of a Gender Perspective
into Budget Analysis and the Budget Itself



Gender-Sensitive Budget *Analysis*

- analytical phase
- assessment of the differential impact of the budget on women and men
- *not* a separate budget for women, but a disaggregation by gender of the overall budget



Gender-Sensitive Budget *Formulation*

- the ultimate goal
- *mainstreaming* of gender issues, i.e. integration of gender into
 - the planning, formulation and implementation of the budget
 - *all* policies, plans and programs

What is GSB?

- Overview -

Levels

national
state
provincial
local

Participants

executive
parliamentarians
NGOs
civil society
independent
researchers

Politics

funding sources
tools of accountability
points of resistance
effects on public debate
& budgetary policy

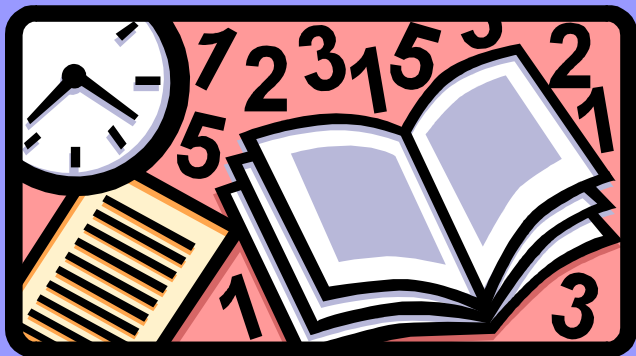
Scope

overall budget or selected parts
revenue collection and/or expenditure
past, current or projected future budget

Reporting Format

separate document or
integration in
existing documents

Why is GSB important?



"Budgets matter because they ... shape policies, set priorities and provide the means to meet the social and economic needs of citizens." —

Noleen Heyzer, Executive Director, UNIFEM.

The Budget

... *NOT* just a technicality, but

- ▶ a crucial policy statement
- ▶ a reflection of the government's social and economic priorities
- ▶ the monetary embodiment of the government's commitment to specific goals and policies

Why is GSB important?

The Budget is about

➤ POLICY SUCCESS

“The Budget is THE most important policy instrument of government.”

(Institute for Democracy in South Africa.)

Money matters: “Programmed action without money amounts to inaction.”

(Institute of Development Studies)

➤ VALUES

“The budget reflects the values of a country – who it values, whose work it values and who it rewards... and who and what and whose work it doesn't.”

(Institute for Democracy in South Africa)

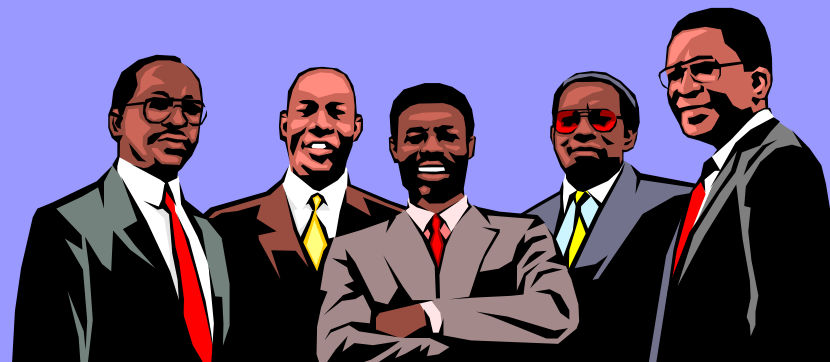


Why is GSB important?

The Problem

- Exclusivity

budget formulation is typically an exclusive process: it leaves out the majority of citizens, especially women, who are disproportionately among the poor and on the periphery of political and economic debates



What the budgetary process often looks like...

- Gender-Blindness

budgets often assume that the needs of *everyone* can be addressed in a uniform, apparently neutral way: they ignore the very real effects of unequal gender relations on women's (and men's) lives *and* the differential impact of policies on men and women



exclusivity and gender-blindness in budgeting perpetuate gender inequality

Why is GSB important?



Why is GSB important?



"Gender-sensitive budgets are important instruments for making governments accountable to women and ensuring that governments live up to the commitments they have made in international conferences ..." -- *Budgets As If People Mattered*, 2000

Equality:

- to show the differential impact of the budget on men & women
- to establish gender equality as a tool & indicator of economic governance
- to make women's underpaid and undervalued labor visible
- to raise awareness of the importance of gender issues

Accountability:

- to provide a tangible measurement (revenues and expenses) to hold governments accountable for their policy on gender
- to translate rhetorical commitments on gender equality and on women's human rights into specific monetary allocations

Why is GSB important?

Efficiency:

- to reduce the major losses in economic efficiency and human development caused by gender inequality
- to inform policy debate, give input about differing priorities of men and women, and thereby improve resource allocation

Transparency & Participation:

- to strengthen the participation of women in budgetary debates and decision-making
- to make transparent how much money is spent on women
- to ensure that women are treated as individuals, and not treated as dependents or subsumed into the household



“There is a growing realization ... that gender inequalities, apart from being unfair, are also costly – not only to women but also to men and children. The costs can be measured in lower economic efficiency, lower output, lower development of people’s capacities, and lower well-being.”
(AusAID)

Who has already done GSB?



Who has already done GSB?

Australia

- the ‘pioneer’ (1984)
- all government agencies required to provide an audit of the budget in terms of its achievements in relation to women and girls
- a comprehensive process, including *all* programs and expenditures, not just those targeted explicitly to females
- scope: federal and state/territorial levels
- a bureaucratic-led strategy: central role of women’s policy offices within the government
- losing of vigor after 1996, due to change of government and weak political pressure from outside



“...The Government continues to place a high priority on the particular needs and concerns of women... This budget includes ... reforms in assistance to families...initiatives to improve access to child care and provide greater practical recognition of the contribution of carers, mostly women, of older or sick people... [It is] also designed to better target the Government’s spending on health, community service and public housing programs: all important issues for Australian women.” (Extract from 1995-96 Women’s Budget Statement)



Who has already done GSB?

South Africa

1) parliamentary/NGO initiative (since 1995)

- analysis of government spending, taxation, public sector employment and macroeconomic policy
- collaboration of the Gender and Economic Policy group within parliament and two NGOs
- involvement of researchers, economists and activists from a wide variety of fields
- funding by international donors
- political transition as a window of opportunity
- levels: initially national and provincial, subsequently also local
- production of information and advocacy material
- organization of gender sensitization workshops

“Networks and alliances between gender-sensitive women as well as some men in cabinet, in Parliament, in departments and in civil society at national, provincial and local levels have been forged in the course of this exercise and these will be the key to taking it forward.” (Pregs Govender, MP)

2) Government initiative

- gender-sensitive budget initiative from within the Ministry of Finance
- pilot of the Commonwealth Gender Budget Initiative to engender macroeconomic policy

→ Success Factor: involvement of actors outside of government

Who has already done GSB?

Great Britain



“There should be a comparative ‘gender impact statement’ published with every budget ...to

- display the differential impact and consequences of policies on men and women*
- ensure that women are treated as individuals and not as dependants or subsumed into the household*
- cause the distribution between the sexes of financial burdens and benefits to be more equitable...*
- begin to show the different forms of unpaid and undervalued work...”*

(WBG Recommendations to UK Government, 1998)

- initiative led by the “Women’s Budget Group,” an NGO/think-tank of researchers and members of women’s and trade union organizations
- objective: putting a gender-sensitive budget analysis on the policy agenda
- their primary focus: tax and social security mechanisms that disadvantage women
- regular meetings with current Labor Government on fiscal policy
- successes: e.g. gender-analysis of UK New Deal Programs → government revision of legislation, eliminating discriminatory effects against women

Who has already done GSB?

France

- Budget Act 2000: requiring the government to present an annex to the budget detailing allocations earmarked to promote gender equality
- reform of the statistical apparatus to more accurately portray the economic status and contributions to the economy of men and women
- conduction of a gender budget analysis by the French Ministry of Economy, Finance and Industry



- results: i.a. recognition of an increasing feminization of poverty

Uganda

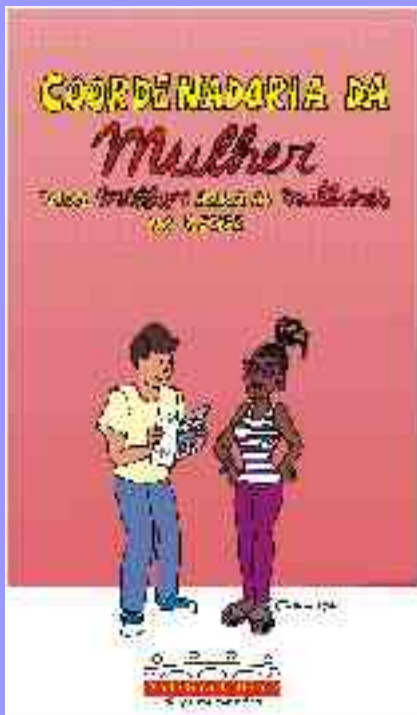


An adorned Karamojong Warrior from Uganda

- presently in the beginning stages of a gender budget analysis exercise
- initiators: a strong parliamentary Women's Caucus and the affiliated NGO Forum for Women in Democracy

Who has already done GSB?

Gender and Participatory Budgeting in the Municipality of Recife, Brasil



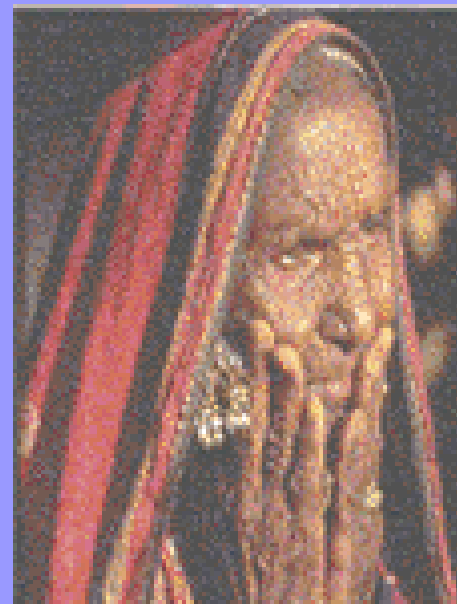
Cooperadora da Mulher Pamphlet

- setting up of the Women’s Coordinating Group (Cooperadora da Mulher) by a newly elected left-oriented government to coordinate the state’s gender policies in 2001
- cooperation with the Municipal Council of Women, a civil society institution
- initiative to increase women’s participation in the participatory budget
 - participatory play areas: mobile recreation spaces for children are installed at budget meeting locations to facilitate participation by women with child care responsibilities
 - campaigns advocating the importance of women’s participation at all stages of the budgetary process
 - establishment of the Thematic Forum on Women, giving women a voice and electoral power in the official structure of the budget-making process

What lessons have we learnt?

Success Factors

- involvement of civil society
- long-term commitments rather than sporadic activities
- alliance and coalition building
- increasing of the participation of women in budgetary debates and decision
- capacity building for
 - GSB advocates: familiarity with budgetary process
 - public officials: gender-sensitization
 - legislature: ability to hold the executive accountable on GSB
- larger political changes → windows of opportunity for GSB



What lessons have we learnt?

Important Next Steps

- systematic evaluation of the impact of gender-sensitive budget analyses
- identification of country-specific methodologies
- continued capacity building
- continued advocacy/awareness-raising



- improved networking and knowledge sharing among participating countries
- continued support for collection of gender-disaggregated data
- development of gender-sensitive participatory research techniques to increase grass-roots participation

What lessons have we learnt?

Major Challenges

- transition from Gender-Sensitive *Analysis* to Gender-Sensitive Budget *Formulation*
- bringing GSB from the margin to the center of development by mainstreaming it into
 - participatory budgeting
 - local governance and decentralization
 - poverty reduction and PRSPs
 - MDG monitoring
- ensuring the sustainability of GSB by
 - enhancing government-civil society partnerships
 - anchoring GSB in parliament, Ministries of Finance, lobby and advocacy group at local, municipal and national level





Sources

- Budlender, Debbie & Rhonda Sharpe with Kerri Allen, “How To Do a Gender-Sensitive Budget Analysis: Contemporary Research and Practice,” Australian Agency for International Development and the Commonwealth Secretariat: Canberra and London, 1998.
- Hofbauer Balmori, Helena, “Gender and Budgets. Overview Report,” Bridge, Institute of Development Studies, University of Sussex: Brighton, 2003.
- UNIFEM, Commonwealth Secretariat & IDRC (Institute for Development Research Center), “Gender-Budget Initiatives” (brochure).
- Cagatay, Nilufer et al., “Budgets As If People Mattered: Democratizing Macroeconomic Policies,” SEPED Conference Paper Series 4, UNDP/SEPED: 2002.
- Bridge, “Gender and Budgets,” *Development and GenderIn Brief* 12 (March 2003), Institute of Development Studies, University of Sussex: Brighton.
http://www.ids.ac.uk/bridge/Bri_bull.html.
- www.unifem.org

Thank you for your attention!



*“If you want to see which way
a country is headed, look at
the country’s budget and how
it allocates resources for
women and children.” –*

Pregs Govender, MP, South Africa