

Gender Analysis of Budgets as a Tool for Achieving Gender Equality in the Arab World *by Simel Esim*

Background and Introduction

The UNDP Arab Human Development Report (AHDR) was the first Human Development Report devoted to a single region. The report highlighted "freedom deficit," gender inequality, low levels of health care, education and information technology usage, and high unemployment as key impediments to development in the region. On the gender inequality front, it highlighted the fact that maternal mortality rate is double that of Latin America, women's literacy still stands at a regional average of 50 percent and their participation in political and economic life is the lowest among all the regions of the world.

In order to correct for these gender inequalities the report called for a large increase in public spending to bring economic, social and political empowerment for women. However it failed to provide concrete ideas on how Arab states can secure the financial resources needed to pay for the programs and policies to achieve these goals (LeVine, 2002). Neither did it provide a discussion of methods and tools researchers, NGOs and other stakeholders could use to monitor the budgetary allocations of government to ensure progress toward achieving gender equality goals.

I will focus on policy relevant research to track, monitor and evaluate national and local public budgets from a gender and poverty perspective. I will highlight some potential tools and initial efforts around the region in launching gender analysis of budget initiatives that involve donor agencies, NGOs, researchers and some government agencies. I will conclude by reflecting on potential next steps in the region considering space is opening up within the current policy environment to discuss and apply such strategic policy tools.

Public Budgets and Budgetary Analysis

A national, regional, or local budget reflects a government's social and economic priorities more than any other instrument—budgets are the place where policies and programs are defined and translated into resource allocations. The formulation of a budget using traditional macroeconomic practices may appear to be a gender-neutral process, as generally there is no explicit reference to the different rights, responsibilities, and capabilities that men and women have in society. Budgetary allocations can and do, however, transmit and reproduce gender biases throughout a society (see Box 1).

Examining budgets through a gender lens can help identify gaps in access to and distribution of public resources. Such budgets are not budgets formulated separately for men and women. Rather, the overarching objective of bringing gender-analysis to budgets is to redefine priorities and reallocate relevant resources that respond to the needs of the entire population, taking explicit account of women's disadvantaged position. Gender-aware budgets promote both equity and efficiency.

Making the process of budgeting more gender-aware requires the development and application of various tools and techniques and their translation into forms easily accessible by civil society representatives. Although no "blueprint" exists for conducting gender analyses of budgets, many of the tools that are commonly recognized as pivotal options in this process were outlined in the past few years by economists (Elson, 1999).

Gender-aware Policy Appraisal. This most frequently used analysis evaluates the policies that underlie budget appropriations to identify their likely impact on men and women. This means examining government policies and services from a gender perspective by asking: Are the policies and their associated resource allocations likely to reduce, increase, or leave unchanged gender inequalities? It offers a means to

identify policy gaps and limitations as well as the adequacy of resource allocations. As an example, the Women's Budget Group, a nongovernmental organization (NGO) in the United Kingdom, conducted policy analysis of the impact on women in poor households of Value Added Taxes (VAT), the indirect taxes on basic consumer goods that can make up over 30 percent of government revenue. Based on their findings that women as managers of daily household expenditures carry a disproportionately larger burden of the VAT, the NGO was able to convince the government to rescind some of the indirect taxes.

Gender-disaggregated Beneficiary Assessments. This research technique is used to collect and analyze the opinions of men and women who are actual or potential beneficiaries of government programs on the extent to which existing public service delivery meets their needs, and how concurrent patterns of public expenditure accord with their priorities. Opinion polls, attitude surveys, and focus group discussions are some of the ways for collecting data. Public hearings on budgets can also be held by Ministries of Women's Affairs and Parliamentary Committees so beneficiaries can discuss public expenditure priorities from a gender perspective.

Box 1: Public Sector Budgets & Democratic Participation

The budget directly or indirectly affects the lives of all citizens; yet, it is those most vulnerable who are often hit by budgetary decisions into which they may have little to no input, in areas such as education or health. In many countries, the lack of information on budget issues has hindered the participation of civil society in the debate on distribution of national resources. Budget analysis by independent researchers, civil society organizations, and government bodies themselves is critical in fostering a more open, democratic, and participatory society, where government processes are transparent and leaders accountable to the people.

Box 2. Analyzing Budgets

There are a number of ways to analyze a budget. Sectoral analysis involves analyzing budget line items in a specific sector, such as agriculture or labor. Inter-sectoral analysis is also common, whereby a sector can be analyzed relative to others, such as the military sector as compared to one or more social sectors. With both methods, one can ask "how does the budget take into account the interests and needs of women and girls, especially from poorer households?"

Gender-disaggregated Public Expenditure Incidence Analysis. This method compares the extent to which men and women, and girls and boys, benefit from expenditure on publicly provided services—usually with data from household surveys—to assess the distribution of public spending by gender. The Ministry of Finance and those ministries responsible for providing public services are likely users of public expenditure incidence analyses. As an example, researchers from the World Bank and the Government of Ghana conducted an Extended Poverty Study (EPS) in 1993-94, whereby data on both the allocation of public resources and the behavior of households in using government services were obtained. The analysis found that evidence of gender differences existed in the distribution of social spending in Ghana, especially in education. Taking the country as a whole, girls received 45 percent of primary-level subsidies while their gross enrollment ratio was 67 percent—one-third higher than the subsidies. This gender bias was more marked among poorer households, but was evident among all income levels (Demery 1997).

Gender-disaggregated Analysis of the Impact of the Budget on Time Use. There are three uses of time—paid work, unpaid work, and leisure; however, neo-classical economic theory only takes two into account—work and leisure. More of women’s work than men’s is left out of national income accounts because of the nature of their work outside formal labor market in subsistence production, informal employment, domestic or reproductive work, and voluntary or community work. Gender-disaggregated analysis time-use data examines the relationships between the national budget and the way time is used in households, so as to reveal the extent of unpaid work to be accounted for in policy analysis.

The Central Statistical Offices are the key in-country institutions that have the capacity to conduct regular, comprehensive time-use surveys at the household level and construct “satellite” income accounts, which measure unpaid work. Much progress has been made regarding the conceptual, methodological, and practical implications of incorporating unpaid work in national income accounts in the last two decades through these satellite accounts. The System of National Accounts (SNA), a new set of international guidelines that determine the Gross Domestic Product (GDP) was revised to include all goods produced in the household and, by extension, production-related activities. Although unpaid domestic and personal services (such as cooking and childcare) are still not included, the SNA suggests that alternate concepts of GDP be devised for use in satellite accounts. NGOs can contribute to the collection of accurate time-use data by monitoring the use of the daily time-use logs at the household level.

Application of the Tools

Although gender budget initiatives have existed for 20 years, they have become more widely recognized since the 1995 United Nations Fourth World Conference on Women in Beijing and used as tools for implementing and monitoring gender-related commitments, recommendations, and action plans. Gender budget initiatives can be launched by governments, by civil society organizations, or by government–civil society partnerships.

The Commonwealth Secretariat Gender Budget Initiative, established in 1996, was developed and implemented by ministers in countries as diverse as Barbados, Fiji, and Sri Lanka. Other governments that have adopted some form of gender analysis of budgets include Bangladesh, India, Norway, and Switzerland (Budlender 2000). Public officials tend to be concerned about costly gender biases that result in lower outputs and hinder human resource development. At the national level, engaging Ministries of Finance is particularly important.

Other well-known initiatives such as the South Africa’s Women’s Budget Initiative and the work of the Forum for Women in Democracy (FOWODE) in Uganda have been spearheaded through strategic partnerships between NGOs and parliamentary bodies. Generally, these initiatives have stressed reprioritization rather than an increase in overall government expenditures—to achieve better policies and greater democratization of the budgetary process. Stakeholders in Canada, Malawi, Mexico, the Philippines, Tanzania, and Zimbabwe have also launched gender analyses of national and local budget processes.

Civil society actors seek to gain recognition for the contributions that women make in the market and in the care economy, and for the leadership they provide in society. By advocating gender-sensitive policy transformation, these varied efforts have, at the very least, initiated better access to and collection of the information and data necessary for scrutiny of budgets and highlighted the needs of the most poor and powerless.

Multilateral organizations like the Commonwealth Secretariat, the United Nations Development Fund for Women (UNIFEM), and the

United Nations Development Program (UNDP), have promoted work on gender budgets and provided much program support in this area. Initiatives also have strong backing from bilateral organizations in Canada, Denmark, Germany, the Netherlands, Norway, Sweden, Switzerland, and the United Kingdom. Some private foundations based in the U.S., including the Asia Foundation and the Ford Foundation, are also supporting work in this area.

Impact of Gender Analysis of Budgets

Because they are so new, it is difficult to evaluate the impact of gender budget initiatives on different population groups. One clear indication of their potential is the proliferation of initiatives around the world, as well as the increase in stakeholders involved in the budgeting process who are advocating gender equality. Importantly, though, this novel way of examining expenditures and revenues has built up considerable capacity within government and research bodies and the NGO community, as well as fostered new alliances of groups advocating gender analysis. These new initiatives have also contributed to greater transparency and accountability of the government budget process in several countries. UNIFEM has stressed that success involves three groups working cooperatively: reform-minded elected officials at the national and local levels; functioning government institutions staffed with responsive and technically qualified individuals; and active, well-informed coalitions of NGOs and community groups (Carr 2000). Additionally, gender analysis of budgets has introduced an important social process of dialogue and negotiation with women themselves.

Current Work in the Region

While there are a number of key institutions that conduct quality budgetary analysis in the region their focus has not been on gender analysis of budgets that could be used to track government spending on sectors such as education and health (see Box 3). These are potential institutions to tap into for their budgetary analysis skills and to match with gender analysts and researchers to undertake gender analysis of budgets.

Box 3. Centers for Budgetary Analysis in the Region

Lebanese Center for Policy Studies — Research institute based in Beirut that studies issues related to democracy and governance, civil society, economic policy, international relations, education, and the environment. <http://www.lcps-lebanon.org/>
Public Administration Institute (PAI) of An-Najah National University — Based in West Bank/Palestine, the institute carries out public finance research of Palestinian institutions <http://www.najah.edu/english/Research/publiccenter.htm>
Public Administration Research Center (PARC) -- Established in 1995 as an academic research within the Cairo University to provide research, consultation and training services in the field of public administration and contributing towards enhancing the performance of public and local administration. <http://193.227.8.2/text/parc/index.html>

Source: *International Budget Project*. 2002. www.internationalbudget.org

In most countries gender analysis of budgets starts off from the social sectors (education, health, social welfare) and moves onto economic sectors (agriculture, labor, industry) and then to more infrastructure related sectors (energy, transport). The only country in the region that has taken substantial steps in integrating gender analysis of budgets into its policy processes with participation of NGOs, parliament, government and donor agencies is Morocco (see Box 4). In Egypt, a meeting was recently held toward establishing a policy dialogue on gender responsive budgeting.

Box 4. A Series of Gender Budget Initiatives in Morocco

In order to launch the gender analysis of the budget process addressing the needs and concerns of women and men and girls and boys, the Budget Directorate of the Ministry of Finance has recently launched, with the support of the World Bank, a study aiming to develop an appropriate methodology for Morocco on the basis of the gender analysis of the 1997/1998 budgetary accounts. The 1997/1998 fiscal year was chosen given the availability, for these years, of a variety of data necessary for a proper gender analysis of the impact of budgetary allocations and expenditures. The 1997 Household Standard of Living Survey and the 1997/1998 Women's Time-Budget Survey furnished the complementary information required to delineate the impact of the national budget during that period. The study outlines a number of elements which are a prerequisite for the mainstreaming of gender concerns in the elaboration of budgets and the evaluation of the gendered impact of budgetary expenditures. The study considered this gender mainstreaming approach as a profound reform requiring two types of preliminary capacity building exercises: one geared to the supply side, namely strengthening the capacities of budgetary and planning decision-makers and professional staff in gender analysis techniques of the budget process; and the other geared to the demand side, namely strengthening the budget literacy of women's NGO and parliamentarians. This two-pronged approach will promote dialogue between these two types of stakeholders as well as the transparency of the results of development policies and programmes. Other initiatives carried out in Morocco to launch the gender analysis of budgets process include :

- Establishment of a National Committee on 16 November 2001 to oversee the process. This Committee recommended the development of a national capacity-building programme in the gender analysis of budgets.
- Fielding of a UNIFEM mission in March 2002 to discuss the possible axis of an economic governance programme in Morocco, including the implementation of the gender analysis of budgets initiative.
- Organization of a seminar on "Participatory Budgets : Parliament and Civil Society – What mechanisms for collaboration?" (13-14 June 2002), a first initiative aimed at sensitising parliamentarians and NGO on the topic.

Source: UNIFEM. 2002. For more information contact Nisreen.Alami@undp.org

Box 5. Strategies for Governments in the Arab Region for Gender Analysis of Budgets

- Allocate funds in support of research and gather data for gender analysis of budgets.
- Work with national statistical offices to better identify disadvantaged groups.
- Measure the extent of disadvantage and provide gender-disaggregated information.
- Identify stakeholders and establish coalitions/national task forces among researchers, NGOs and parliamentarians to launch gender-sensitive budget initiatives.
- Employ one or more of the six tools for integrating gender into public expenditure policies.
- Plan visits by parliamentarians, officials from Ministries, women's organizations and other civil society organizations to countries with gender budget initiatives.
- Organize gender budget workshops with the participation of implementers of gender-sensitive budget initiatives (Australia, South Africa) and national parliamentarians, officials from Ministries, women's organizations and other civil society organizations from the region.
- Use popular explanations of gender budget initiatives, such as Money Matters: Women and the Government Budget from South Africa, to inform stakeholders about what these initiatives mean and how they can be used.
- Establish pilot regions, and sectors to launch gender-sensitive budget initiatives.
- Sensitization and training workshops for government and NGO representatives at the sub-regional or country levels to develop and use tools for gender-sensitive budget analysis.
- Establish coordination at the interagency level among interested government institutions and NGOs in the region and multilateral and bilateral agencies for funding purposes.

Source Esim, 2000 <http://www.hsph.harvard.edu/Organizations/healthnet/gender/docs/esim.html>

Conclusions

Gender budget initiatives are opportune when there is heightened awareness of good governance, decentralization, and people's rights to information. The AHDR brought these issues into the forefront in the Arab region. The supportiveness and receptivity of the policy environment to tackle these issues in the coming years will determine the applicability of a strategic policy research tool such as gender analysis of budgets to the region. It would be important to start by creating a platform of policy dialogue, and debate with interested parties such as parliamentary bodies, research organizations, NGOs, government agencies. These discussions could then determine for each country whether to have gender responsive budgeting initiatives introduced at the national level, state/district level, or municipal level. They could be inside government, outside government, or based in partnerships of civil society, parliamentarians, ministers and officials. Government agencies in the countries that are interested in this exercise can use a number of strategies for launching new gender-sensitive budget initiatives or supporting existing initiatives (see Box 5).

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