



# Gender Budgeting

Gender, Women's Rights & Governance Course

MSTCDC April 2013

# What is a Budget?

- A comprehensive statement of Government finances, including spending, revenues, deficit or surplus, and debt.
- The budget indicates how a Government plans to raise and use public resources to meet policy goals

# Civic engagement

- How can the participants from village or district level utilize budgets to measure impact of poverty reduction strategies?

# Challenges

- CSO capacity to advocate for change is weak
- Lack of accountability due to weak institutional set up for monitoring
- Political will to encourage accountability is lacking
- How to enforce roles/responsibilities for budget tracking and responsibility –  
Accountability
- Capacity to analyze budgets lacking by many



# Concepts

# Gender

- **Gender** refers to the **roles and responsibilities** of men and women that are **created** in our families, our societies and our cultures.
- It includes the **expectations** held about the characteristics, ability and likely behaviors of both women and men.
- Gender roles and expectations are **learned**. They can **change** over time and they vary within and between cultures.

SEX IS WHAT YOU'RE BORN WITH,  
GENDER IS WHAT YOU'RE GIVEN



# Gender concepts

- **Gender Equity** is a process of being **fair** to men and women – social economic resources and opportunities
- **Gender equality** means that women and men have the **same rights and opportunities** in all areas of life (equal treatment under the law)
- It also means that all people are **free** to develop their personal **abilities** and to **make choices** without limitations imposed by strict gender roles.



# The Gender wheel

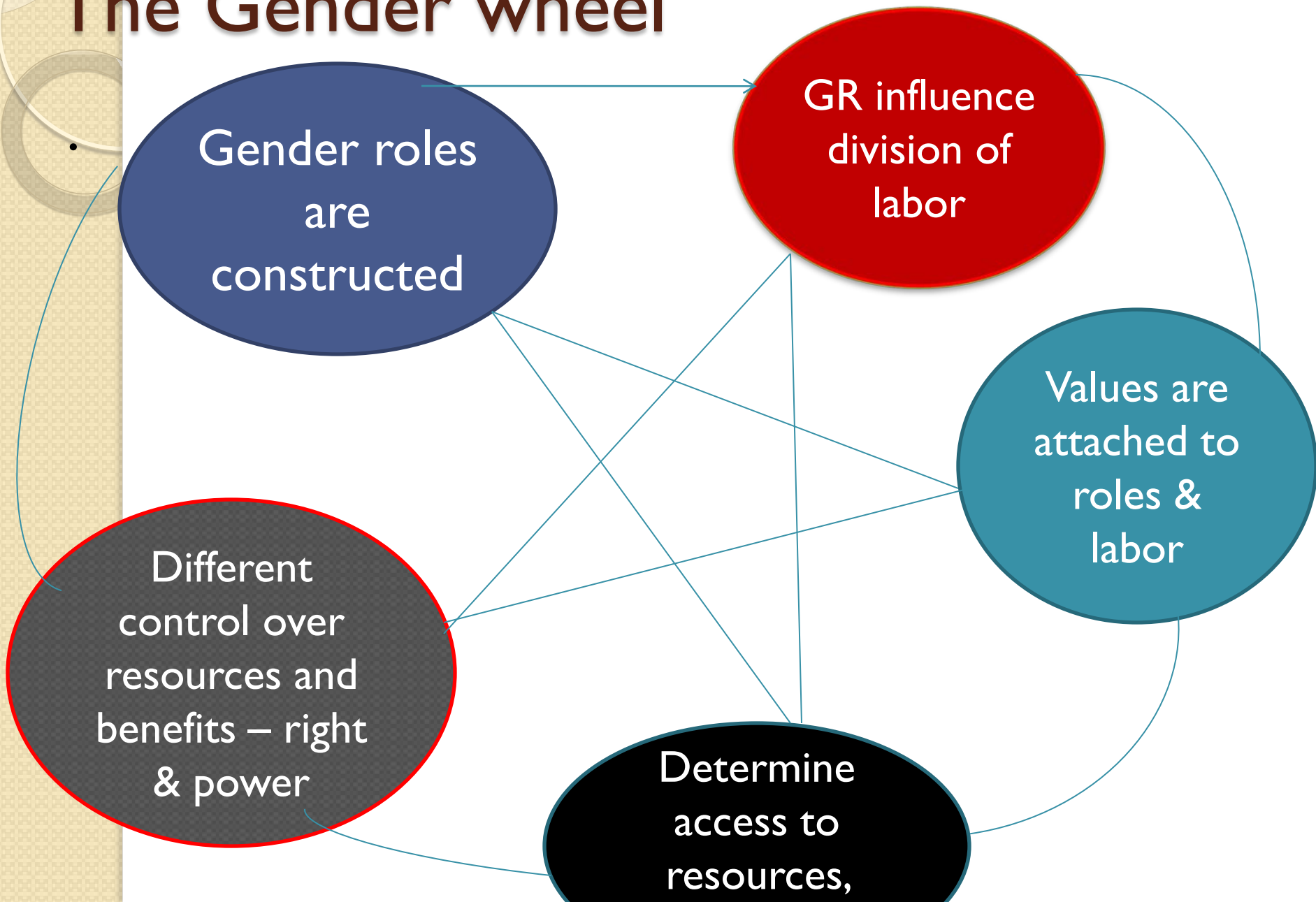
Gender roles  
are  
constructed

GR influence  
division of  
labor

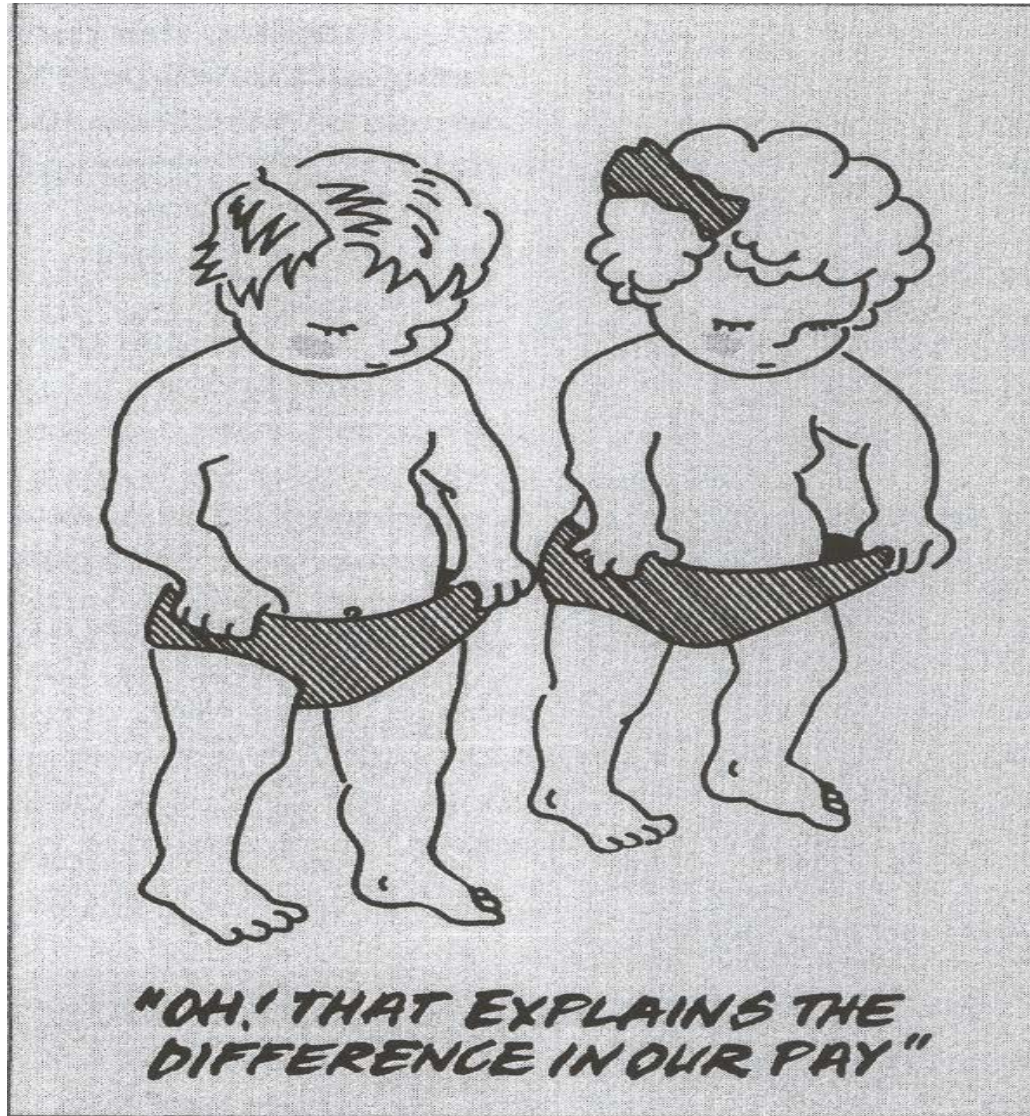
Values are  
attached to  
roles &  
labor

Different  
control over  
resources and  
benefits – right  
& power

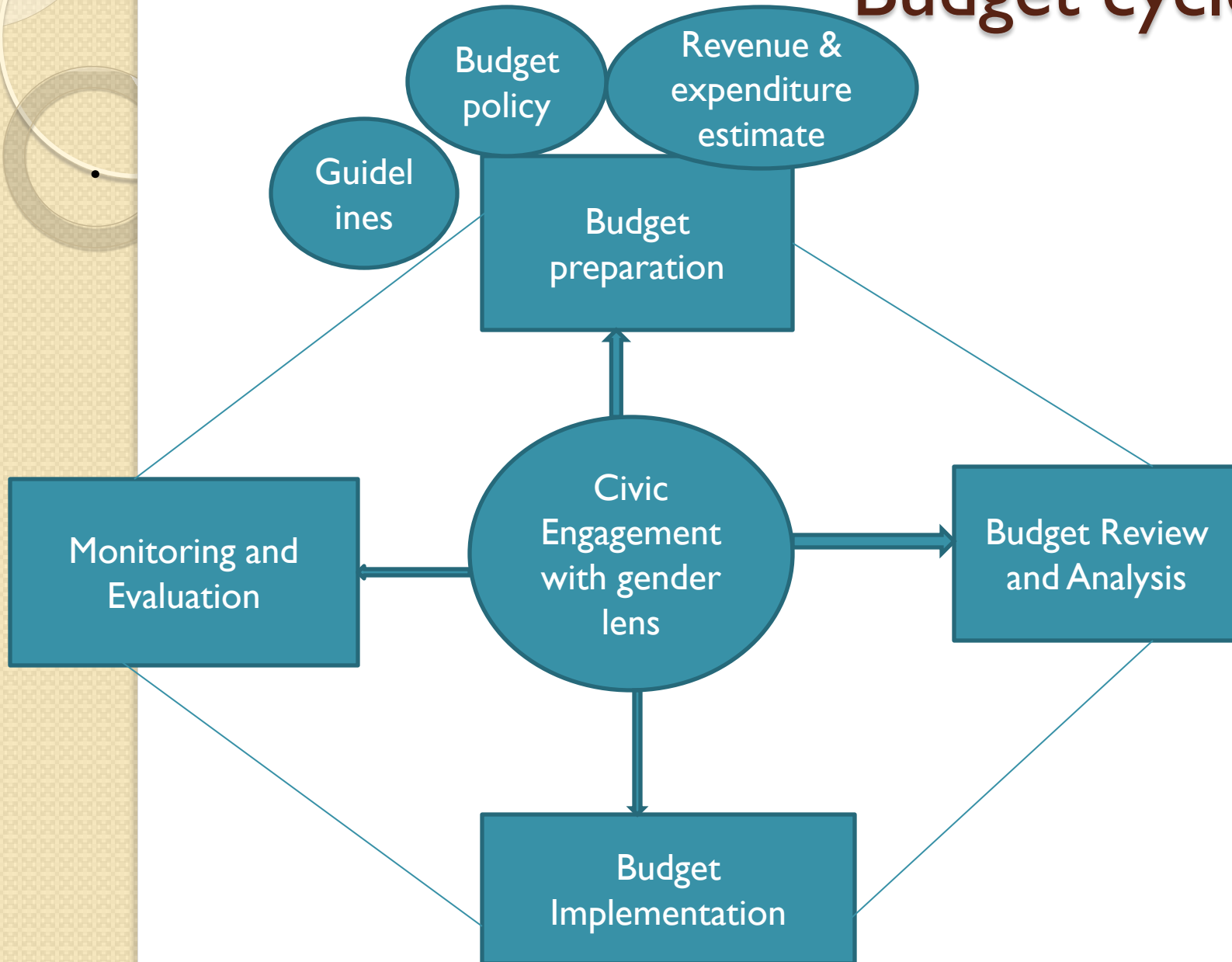
Determine  
access to  
resources,



# Expectations, Roles, Values, benefits



# Budget cycle



# What is G.B?

- It is a tool/an attempt to assess Government priorities as they are reflected through the budget and examine how they impact women and men; girls/boys
- An approach of allocating resources in consideration of gender equity policy
- A use of gender lens from which to analyze budgets at National, district and Civic levels

# What is G.B

- A gender budget is not a separate budget for women, It is not neither ensuring that the same is spent on men and women
- It is an attempt to **assess what the impact** of the spending is on men and women and whether or no budgets respond to the **needs, interests, constraints** of both women and men
- G.B not simply about spending, they also examine Gvt revenue and its implication for women and men - Taxation

# Budgets

- Budgets and policies are not neutral instruments, they have different results for various groups, according to their class, gender, race and global imperial location eg HBC
- Budgets can either promote women's equality or exacerbate women's inequality – can either increase income gaps and other forms of inequality or can lessen them

# Budgets

- Gender blind budget increase inequality in the country
- Budgets are one of the influential policy documents of the Government

# Why do a gender budget?

- Improve economic equality
- For Example, research shows that:
  - reducing gender inequalities in Africa
  - could significantly increase production in agricultural yields
  - Collateral exists between a country's failure to invest in the education of girls and a lower level of GNP



# Why G.B

- Increasing the income of **mothers**, will have a more positive impact on the nutrition, health and education of children
- Macroeconomic policies and budget are at the heart of the Govt. decisions about resources
- Policies describe the needs and prioritize strategies for meeting these needs

# Why G.B

- Budget allocates resources to meet the social and economic needs of different segments of society according to priorities outlined in policies
- All these (policies and budgets) have different impacts to the lives of men, women, depending on the gender relations and socio economic factors at different levels of the society

# Why G.B

- Improve effectiveness, efficiency, accountability and transparency of Government budgets
- G.B can reveal discrepancies between what a Gvt says is doing and the actual impact of Government policies

# Why Gender Budget

- An important element in achieving MDGs is for the developing countries to priorities the use of budget resources towards the needs of the poor
- Gender and participatory budgeting are two new approaches which can promote the interests of marginalized groups and direct public money to better reflect the needs of the poor

# Why Gender budget

- Gender budget analysis provides accessible information on how budget inequalities impact negatively on both women and society as a whole.
- GB highlights areas where governments can redress the balance

# Why GB

- G.B offer a practical way for Gvt to implement their obligations under International human rights agreement such as CEDAW
- G.B provide a means for Citizen engagement in public decision making – enhance women's participation thru affirmative action

# Who does Gender budgets?

- People within and outside Govt. should be involved in gender budgeting
- Govt. people can work to implement gender analysis policies in the budget process
- Activists can analyse the gaps and push the Govt. to consider the importance and benefits of gender equality
- Community can encourage Govt. to make gender specific data available to them

# Who does G.B

- Gender budgeting requires leadership and **political commitment**
- Getting more people involved in the budget process increase democracy
- Australia in 1984 examined the impact of budgets on women and girls
- S.A (1996), Tz (1997) and Uganda (1999) examine the impacts of SAPS focus on education and health



# Planning and Budget Cycle

- Needs and problem identification
- Prioritization of the needs and problems
- Identification and appraisal of investment
- Preparation of the budget framework paper
- Budget Conference
- Identification of project/investment
- Discussion of draft sectoral plans and budgets
- Appraisal, Implementation and M&E



# Tools

# Gender Budgeting Tools

- **Gender Disaggregated Beneficiary Assessment (GDBS)** What kind of spending would women and men prioritize in the budget?
- **Gender Aware Budget Statement (GABS)**
  - How to ensure government accountability for gender equality?
- **Gender Aware policy appraisal** – Will govt policies reduce, maintain or increase gender inequalities?

# Gender Budgeting Tools

- Gender Disaggregated Public Expenditure Incidence Analysis – Does public spending benefit women and men equally?
- Gender Disaggregated Budget Time use – what is impact of budgets on women's time?
- Gender Disaggregated Tax Incidence Analysis – How do taxation policies impact women and men?

# Gender Budgeting Tools

- Gender Aware Medium Term Policy Framework – How can vulnerable groups influence budget planning?
- Gender Aware Budget Statement (GABS) – Accountability and commitment

# GB Analytical Tools

- Gender Disaggregated Beneficiary Assessment (GDBS) What kind of spending would women and men prioritize in the budget?
- The GDBS is mainly used during the review of the previous years' performance

# Gender Disaggregated Beneficiary Assessment (GDBA)

At the Sector level – Identification

- Situational Analysis to generate disaggregated data about the area of focus – needs, concerns and issues that need attention
- Analyze the previous/on going interventions to ascertain gender gaps in the benefits and what are the constraints
- Articulate key gender issues for each of the core program - interventions

# Key question in Situational Analysis

- What is the current situation of men, women  
- benefits, needs, interests, and constraints?
- Are women and men's needs, interests and constraints equally addressed by the ongoing programs? Who benefits?
- What hinders women, men from benefitting from the on going interventions?
- What changes can be introduced?
- What interventions can be undertaken?



# GDBA at the Sector level - Planning

Sector	Identified problems/need	Identified gender gaps/issues	Proposed interventions	Budget	Budget source
Health	High HIV/AIDS prevalence	PMTCT is regarded as women issue, hence no support from the community	Change of policy Awareness creation	8,000	ODA

# Implementation

Follow up to ensure that the interventions identified are implemented through:

- Backstopping the program officers
- Training in key areas like gender planning and budgeting
- Review the annual and quarterly work plans and budgets
- Prepare Gender Aware Budget Statements along with their annual and quarterly plans

# Monitoring

The purpose is to ensure accountability on the progress of the activities and their impact on men and women and establish information that can guide decision making

Monitoring steps:

- Check the planned activities/interventions and the budgets attached
- Establish the actual funds released

Check the progress made & compile report

# Monitoring questions

- What are the outputs and outcomes of the implemented activities and how have these affected men and women?
- Who is benefitting more from the intervention and why?
- How can other marginalized groups also benefit from the interventions?

# GDBA at the community level

- GDBA involves Capturing the voices of the citizens with regards to the actual benefits of programs. It depends on the **opinions** and **attitudes** of the beneficiary
- GDBA can be done thru FGD, observation, PRA techniques like ranking, key interviews, checklists etc

# Format to capture information from the communities

Key Sector Program	Key sector intervention undertaken	Major benefit impact of the program	Gaps in the impact b/n F&M	Key reasons for gaps	Appropriate intervention to address identified gaps	Budget/cost
Education	UPE	High enrolment	Girls dropout	Early marriage	Law enforcement	5000
		Increase in No. of teachers	No female teachers	Poor infrastructure	Construction of teachers houses	8,000

# Group work

- Choose any sector and by using GDBA tools (at the sectoral and the community levels), analyse the impact of the budget of the previous year and recommend for appropriate interventions

# Gender Aware Budget Statement (GABS)

- GABS is purposely for assessing the extent to which the current budget addresses the needs, concerns and interests of males and females
- The GABS should be used to guide the implementation of the budget
- It is an accountability report by the Govt in relation to its gender equity objectives



# GABS

- GABS helps to disaggregate the ways females and males are positioned in different aspects and how these influence budget allocations
- GABS provide information during the formulation, implementation and evaluation of the budget.

# GABS indicators

- Females and males' access and benefit from services delivered thru the allocated funds
- Females and males' access to employment/ decision making and the benefits that accrued to them along with the positions held
- Gender balance in business support and related opportunities
- Gender balance in public contracts
- Compile and summarize findings

# GABS Indicators

- Quality of health services provided to both men and women
- Quality of education accessible to both girls and boys at all levels
- Capacity of men and women in planning and implementing development programs

# Gender Aware Budget Statement (GABS)

Gender analysis should be carried out to show:

- How will the program or activity affect men and women, boys and girls?
- Is the program or activity leading to widening or reducing the gender gap(s)
- What measures will be undertaken to mitigate the negative impacts (if any)?

# The Story of the Fox and the Crane

## Gender Equality does not mean the same treatment



The Fox invited the Crane to dinner. He served the food on a large flat dish. The Crane with her long, narrow beak could not eat.



The Crane invited the Fox to dinner. She served the food in a deep vase, and so the Fox with his short, wide face could not eat.

Both friends had an equal opportunity for nourishment, but each time one of them could not take advantage of this opportunity.

The development challenge in every case is to identify barriers to the opportunities that exist, and custom design the adjusted interventions that will  
*lead to equality of outcome*

# Questions!!!!/Comments!!!

- Discussions!!!!