Gender budgets:
what's in it for NGOs?

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Over the last seven years, there has been increasing interest in gender budget work worldwide. Over 50 countries have had gender budget initiatives of one sort or another. There are, however, big differences between the initiatives in different countries. In particular, in some cases the initiatives have been located inside government; in other cases in Parliament; and in yet others within civil society. This article discusses what gender budgets entail, and why non-governmental organisations (NGOs) might be interested in engaging in them.

What is gender budget work?

Gender budget work focuses on the impact of government budgets on women and men, girls and boys, and different sub-groups of women and men, girls and boys – for example, rich and poor, black and white, rural and urban, young and old. The work is a special type of policy work. The 'added value' of focusing on the budget is that the budget is the most important tool of policy of any government. Stated simply, no other policy tool of government will work unless money is allocated to implement it.

Gender budget work involves five steps:

- First, you need to describe the situation of women and men, girls and boys, who are served by a particular sector or ministry, such as agriculture or health.
- Second, you need to examine government policies and programmes in the sector, to see whether they address the 'gender gaps' – that is, inequalities in the service offered to each group as described in the first step.
- Third, you examine the budget to see whether sufficient money has been allocated to implement effectively the gender-sensitive policies and programmes identified in step two.
- Fourth, you need to monitor whether the allocated money has been spent. You also need to monitor who benefited from the money – for example, whether funding for health services reached women or men through clinics, hospitals and extension services, and whether these women and men were rich or poor, urban or rural, etc.
- Fifth, you need to go back to the first step and re-examine the situation, to see whether the budget and its associated programme has improved on what was initially described.

Anyone who has engaged in policy analysis will recognise many of these steps.

The 'added value' of the gender budget approach begins at step three, where we move beyond wish lists of what is desirable, to see whether programmes and policies are being implemented.

What gender budget work is not

Gender budget work is not about advocating for the establishment of a separate budget for women, or a separate budget for the eradication of gender inequality. It is also not about calculating what percentage of the budget is allocated to projects which address gender inequality, the resources (for example, staffing and associated costs) of institutions which work on inequality, or women's projects. Instead, it is about ensuring that all parts of the government budget take account of the different needs and interests of different groups of citizens.

Nor is gender budget work about requesting a 50/50 share of budgets to go to female and male citizens. Rather, it is about understanding the needs and interests of female and male citizens, and seeing that the available resources are allocated equitably. In health, for example, more than 50 per cent of the budget must be allocated for female citizens, because women bear children as well as suffer from non-sex-specific conditions like malaria, HIV/AIDS or influenza.

Why should NGOs get involved?

Because gender budget work focuses on government budgets, it might seem that the natural location for the work is within government. Many of the multilateral institutions and bilateral donors have adopted this standpoint, and targeted their energy and resources on government in their advocacy work. Gender budget work within government aims to ensure that policies are planned and budgets are allocated in a gender-sensitive way. It also aims to ensure that governments report on their allocations and budget implementation in a transparent and gender-specific way.

Believing that the only useful location for gender budget work is within government is, however, limited. Gender budget work carried out within Parliament and civil society can also bring many benefits. This work involves research and advocacy to understand what governments are doing with their money, and to try to influence the allocations. In virtually any country, performing gender budget work outside government can contribute to broad objectives such as democratic governance, transparency, accountability and civic participation. Depending on the politics of a particular country at a particular time, working from outside government can sometimes bring more benefits than working within it. Perhaps a good example of this is the case of Tanzania, where the government is working together with the Tanzania Gender Networking Programme, Tanzania's gender budget NGO. (For more information about TGNP, see the web page www.tgnp.org.za).

Even if an NGO carries out gender budget work in isolation from government, which results in minimal shifts in budget allocations, such work can make a difference in other ways. In addition to undertaking gender budget work as a stand-alone activity, NGOs can also incorporate gender budget analysis and advocacy as a tool in their existing programmes. For example, a South African NGO, the Centre for the Study of Violence and Reconciliation (CSVR), which has extensive experience in researching, training police, and advocacy on gender-based violence, has added the gender budget approach to its tool-kit. First, CSVR conducted a survey to find out what financial and other assistance was being given by government to national and provincial NGOs who were providing

services to survivors of gender-based violence, in areas where government was not providing these services. Secondly, it interviewed national and provincial government officials to find out what allocations for gender-based violence exist in their budgets. Thirdly, it conducted case studies of women who have been subjected to violence to find out the financial costs they incurred.

Where to start?

Decide the focus

The description of the five steps of the gender budget process which I gave above will have revealed to an alert reader that gender budget work is about an analysis of sectoral budgets rather than the budget of the Ministry of Finance. In most countries, the Ministry of Finance is the main decision-maker in determining the overall amount of money available, how this is raised, and how much each ministry gets. However, the individual ministries make most of the decisions about how they allocate and spend the money.

A focus on the Ministry of Finance can, however, also be useful. In particular, it reveals who the key decision-makers are. It can also lead to looking at the budget process in more detail, and seeing where there are opportunities for influence.

Unfortunately, in most countries the opportunities for influence are very few. One important part of gender budget work taking place outside government is about trying to increase the number and scope of such opportunities. Many people think that Parliament presents a 'window of opportunity'. In fact, in most countries parliamentarians have very few powers in relation to budgets. Further, in many countries even female parliamentarians have shown limited interest in gender budget work. But there are exceptions, such as in Uganda and South Africa, where female parliamentarians have played a key role in gender budget initiatives. In Uganda, it is the NGO founded by female parliamentarians, Forum for Women in Democracy (FOWODE), that is leading the initiative. In South Africa, female parliamentarians in the national Parliament collaborated with two policy research NGOs to launch the Women's Budget Initiative.

Limit the scale

The potential scope of gender budget work is enormous. It is therefore important to choose a manageable focus to begin with. What that initial focus is depends on the particular country and the actors leading the initiative.

In South Africa after the first democratic elections, there was an opportunity to do a broad policy review, as there was widespread interest in initiating major changes. In the first three years, the gender budget initiative, therefore, reviewed the budgets of all 27 national ministries. In Mexico, the NGO specialising in budget research, and the women's organisation which led gender budget work, decided to focus on budgets for reproductive health. This approach helped them to build on their previous involvement in the International Conference on Population and Development (ICPD) in Cairo in 1994.[1] In Tanzania and Uganda, NGOs have focused on health and education spending, as these were major concerns at the community level after structural adjustment programmes had reduced spending on social sectors.

By restricting the initial focus of your gender budget work, you can increase your understanding, expertise and confidence. Then, in subsequent years, you can build on that foundation and develop the work. Further, in many countries, gender budget workers have found that there are unanticipated opportunities (and sometimes obstacles!) that they could not have foreseen when planning the project at the beginning. Starting small allows you to expand in the direction of the opportunities and avoid the obstacles. It is also necessary for funders to allow you this flexibility.

Who does the work?

Many people think that it is only economists who can do gender budget work. But some countries have successfully relied on non-economists to do gender budget work. Others think that it is only researchers or academics who can do gender budget research. But again, there are exciting examples of people without prior experience in research successfully doing, enjoying, and benefiting from engaging in gender budget analysis.

Involving a wide range of people in gender budget work spreads understanding of the issues and arguments. It provides for a wider range of activists using these arguments convincingly in their advocacy. It also avoids a split between the 'experts' and the activists. In South Africa, the core of NGOs leading this work drew on people in sectoral NGOs to analyse relevant sectoral budgets. For example, the health budget was analysed by a staff member of the Women's Health Project. In Mexico, a policy research organisation did the analysis, but it worked in close collaboration with a broad-based, feminist women's organisation. In Bacolod City in the Philippines, members of a women's organisation working on women's political advancement decided to do the research into their local government budget themselves. Those involved did not have prior experience of research. But they did have experience and knowledge of local government. In fact, one was a city councillor, and another had become the city administrator by the time the first round of research was published. These activists are now using the knowledge they gained in trying to implement gender-sensitive policies in their own city. They are also training their fellow activists and councillors in the region to undertake similar work. The experience and results of the first round of research are reported in *Gender Budget Trail: the Philippine Experience* (Budlender *et al.* 2001), alongside reports for two other local governments.

One aspect of gender budget work, which often discourages gender activists from attempting it, is the need to engage with numbers. At an ideological level, some women activists see numbers and quantitative research in general as part of a male plot to ignore the subtle differences in women's and men's experiences. For others, fear of numbers acts as a barrier to prevent them from taking part.

When activists face their aversion to numbers and overcome this, the results are often exciting. Firstly, you only need very simple arithmetic for gender budget work. The numbers are very large, but the operations are simple addition, subtraction and calculating percentages. Secondly – as stated before – the activists are better able to put forward the arguments if they have learnt to read the budget documents and done the calculations themselves.

How to be taken seriously

In engaging with government on something as 'serious' as the budget, we need to find strategies that assist in ensuring that our work is taken seriously.

One strategy is to make it clear that you are not asking for more money to be allocated to the budget, as asking for more will label you as unrealistic. Instead, whenever suggesting that more be allocated to a particular gender-sensitive programme, you can point out where the money for this can be found – that is, where less can be spent.

When gender budget work begins, many people turn first to military expenditure as a source of money. In South Africa, the gender budget initiative decided not to do this. Firstly, military expenditure had already decreased during the last years of apartheid, once negotiations had started. Secondly, too many other advocates had already made suggestions as to what military expenditure could be used for. Thirdly, the gender budget initiative felt it would be taken more seriously if it focused

on intra-ministry shifts in spending until the budgets of all ministries had been examined. The initiative thus argued, for example, for a shift from promoting tertiary education to adult basic education.

The issue of how to be taken seriously also relates to using the right language, and going into the appropriate amount of detail in your advocacy. To convince government officers, you need to prove that you can engage with them in their own jargon. You also need to show that you understand the subtleties of their work. This understanding is necessary because it avoids their fobbing you off with sidetracking arguments. But it is also important, because some of the subtleties are significant.

The above paragraphs are concerned with being taken seriously by government. But an NGO will also want to be taken seriously by fellow activists, members of other organisations, and the general public. Most people in wider society, and even parliamentarians, will not read a 30-page report. They also will not understand technical jargon. To address this challenge, gender budget workers in South Africa, Tanzania and Uganda developed popular versions of their research, using simpler language. In Tanzania, the NGO illustrated the popular version with cartoons. In South Africa, the initiative developed workshop materials to use with non-reading audiences. These materials have recently been adapted for use in Botswana and Zimbabwe.

Common dangers

There are several common dangers which can confront those who get involved in gender budget work.

The first danger is that one focuses only on women, or gender-targeted expenditures. This approach can be useful in particular circumstances. For example, WomenLink in Korea adopted it to monitor the country's newly introduced gender policy requirement that all local governments make allocation for gender at local government level. However, the danger with this approach is that focus is placed on the sidelines, while 99 per cent of the budget remains gender-neutral or, even worse, is gender-biased.

The second danger is that analysis gets stuck on the earlier of the steps described above. Getting stuck at step two is a particular danger for women's organisations and experienced gender analysts. The danger in having too elaborate a policy analysis is that readers of the work will lose interest before they get to the added value of the focus on budget.

Getting stuck at step three is also a danger. Information on allocations is usually much easier to obtain than information on actual expenditure. However, in many developing countries there is a large difference between allocations and what is actually spent. Alternatively, the money is spent, but goes into someone's back pocket rather than being spent on the intended purpose. Ideally, we want to know both whether the allocated money was spent, and whom it reached.

The third danger is that focus may be misplaced on groups that are relatively less disadvantaged. All governments have less money than they need to meet all the interests of all the different groups. Gender budget work argues that governments should prioritise their expenditure on those who need it most. To put it differently, they should focus expenditure on those who are most disadvantaged and those whose contributions to society are often invisible. Gender is, however, not the only axis of disadvantage. Alongside gender, there is disadvantage on lines of race, location, age, and class.

One way in which this third danger manifests is where gender budgeters focus attention on government grants to women's organisations, without asking what these organisations do and whether the money could be better spent. Another way it manifests itself is when the analysis

and advocacy concentrate on middle-class issues. For example, you might focus attention on the duties imposed on sanitary pads, without acknowledging that the majority of women use rags or newspapers. Or you might focus on the needs of women entrepreneurs without paying attention to women employees and those who are unemployed. Or you could focus on the interests of women civil servants rather than most of female civic society.

The fourth danger is to focus solely on participation. For example, you might advocate strongly for more of the top decision-makers in government to be women, for more female parliamentarians, and for women's participation in public hearings. However, participation of women, either in decision-making or elsewhere, does not ensure sensitivity to gender equality. High-level women are not necessarily gender-sensitive, nor are they necessarily more interested than their male colleagues in poverty issues. They might, though, be more inclined to be aware of issues of unpaid labour.

More generally, providing women with opportunities to participate in public fora does not always ensure either that women attend, or that their voices are heard. In literature and speeches, there is often a conflation of 'gender-sensitive', 'pro-poor' and 'participatory' budgets. These aspects sometimes go together, but they do not do so automatically. Each of the aspects needs to be fought for and monitored separately.

Conclusion

Gender budget work can be exciting. But it is also hard work. Without detailed work, gender budget projects can end up making broad generalised statements that only convince the converted. They can begin and end with sensitisation workshops without any follow-up activity. It is only when you engage with the facts and figures that the added value of looking at the budget becomes apparent. It is only when you begin to know the facts and figures that you can make the unconvinced sit up and take notice. When you present the factual arguments, the other side has to make the choice to refute your arguments, or find good reasons why they do not act on your suggestions.

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Notes

1 Previously, around 80 women's organisations from around the country came together to form the network *Foro Nacional de Mujeres y Políticas de Población* (Foro). The main objective of Foro is to ensure that the agreements and benchmarks of Cairo become reality.

Bibliography

Budlender D., M. Buenaobra, S. Rood, and M.S. Sadorra (2001) *Gender Budget Trail: The Philippine Experience*, The Asia Foundation: Makati City

A review of over 40 country experiences in gender budget work can be found in D. Budlender, D. Elson, G. Hewitt, and T. Mukhopadhyay (2002), *Make Cents: Understanding Gender Responsive Budgets*, Commonwealth Secretariat: London

Information about budget policy work in general, and links to some organisations working from a gender budget perspective, can be found at www.international budget.org

UNIFEM has established a webpage specifically on gender budget work at www.unifem.undp.org/gender_budgets/