

Gender Budgets

Programme Promoting Gender Equality and Women's Rights

Gender Budgeting.

When it comes to equal opportunities money talks too.

Gender budgeting aims at analysing the impacts of a state's national and local revenue as well as expenditure policy on women and men, and drawing up proposals for a *gender-balanced budget policy*. Depending on the country-specific context, other factors of inequality, such as age, religious or ethnic affiliation or place of residence are also included. In addition to the *impact analysis*, gender budgeting comprises:

- ✎ *reprioritising revenue and expenditure policies* at national level so as to take more account of the needs and interests of poor women in particular
- ✎ *implementing relevant policies and programmes*, and
- ✎ *ensuring the ongoing monitoring* of these.

→ Gender budgeting explicitly takes into account unpaid work in the reproduction and subsistence sectors. World-wide this is work undertaken primarily by women, but national statistics do not record it as a basis for economic-policy decisions.

→ The type and scope of *state expenditure* within individual sectors also have gender-specific distribution impacts.

→ Economic gender inequality is not only a violation of fundamental human rights; it entails high macroeconomic costs that must be borne by society as a whole.



Spending cuts have their price. And it is usually paid by women.

In recent years empirical studies have proved that state budgets, as the instrument that is central to macroeconomic policy, are not gender-neutral in their impact. The type and scope of *state revenues* affect women and men to different extents. In many countries, for instance, it has been observed that the introduction of fees in the health sector raises the workload of women, particularly poor women. If families can no longer afford the fees, women must dedicate more time to taking care of sick family members. Behind the much praised efficiency gains in the health sector, we thus find that the costs have merely been shifted onto women in private households.

7 Instruments for Successful Gender Budgeting.

To date the following seven analytical instruments have been developed; they must be tailored to the country-specific context and the relevant issues in each instance.

1. Gender-aware policy and programme appraisal
2. Gender-disaggregated beneficiary assesment
3. Gender-disaggregated public expenditure benefit incidence analysis. A distinction is made between three specific types of expenditure:
 - a) spending on policies and programmes designed specifically to benefit women or men (e.g. funding for women's projects)
 - b) spending on equal opportunities measures in the public sector (e.g. financing nurseries)
 - c) all other spending, which accounts for up to 99% of total expenditure, that cannot be categorised as benefiting any specific group.
4. Gender-disaggregated analysis of the impact of the budget on time use
5. Gender-aware medium-term economic policy framework
6. Gender-disaggregated revenue incidence analysis
7. Gender-aware budget statement

The world has two sexes. And at least 42 gender budget initiatives.

In 1984 Australia was the first country to analyse the gender-specific distribution impacts of state expenditure. In the follow-up to the Fourth World Conference on Women in 1995 in particular, gender budget initiatives became increasingly important world-wide. By early 2002, forty-two industrialised and developing countries across all continents had registered initiatives of this sort. The various initiatives, the ranks of which are growing constantly, differ in terms of:

- ✎ the actors (members of parliament, NGOs, academics),
- ✎ the scope of the analysis (national/local budgets, revenues and/or expenditures),
- ✎ the type of activities (research, publications, training, lobby work)
- ✎ the target group of the initiative (government, general public, media),
- ✎ the phase of the budget process targeted by the initiative (planning, implementation, monitoring, evaluation),
- ✎ political dynamics.

Experience to date indicates that *gender budgeting is most successful* when a country has an initiative carried out by both governmental and non-governmental organisations.

The Programme “Promoting Gender Equality and Women’s Rights”: New Impetus for Equal Opportunities...

The GTZ offers the following advisory services to support gender budget initiatives, especially in PRSP countries:

- ✎ **Sensitisation of civil servants in the financial sector.** Ministries of finance have a key role to play, partly because they decide on financial-policy frameworks, and partly because they have the technical expertise and access to relevant data. Civil servants responsible for budgeting do not, however, always perceive the immediate relevance of gender aspects. Awareness measures aim at underlining the correlation between the economic inequality of women and men and other economic factors.

- ✎ **Adaptation and fine-tuning of analytical instruments to the context.** In conjunction with the national poverty reduction strategy papers (PRSP) many countries are currently introducing medium-term financial planning and are moving towards a



system of programme budgeting. Ministries of finance can be advised on how best to adapt existing gender budget analytical instruments to the new budgetary procedures.

- ✎ **Training and upgrading for those responsible for budgeting.** Special training courses and workshops are held for those responsible for budgets. At these events the technical instruments used in gender budgeting are explained.
- ✎ **Consultancy services for statistics offices and research institutes.** In many countries the statistics needed to perform a gender analysis of the budget are either not recorded at all (e.g. data on time budgets), or not recorded in a gender-differentiated manner. We can advise statistics offices and research institutes on how best to gather and analyse gender-disaggregated data.
- ✎ **Strengthening civil society.** Before civil society can become more involved in discussions on budget-related decisions of their government and can demand more gender equality, the actors must become familiar with basic economic terms and approaches and with the process of drawing up a budget. Training and upgrading workshops target women’s organisations and female members of parliament in particular.
- ✎ **Development of training material in the field of gender and macroeconomics.** In collaboration with the British Gender and Development Information Service *BRIDGE* the Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ) has produced a Glossary on Macroeconomics from a Gender Perspective. In South Africa, the GTZ helped the NGO *Gender, Education and Training Network (GETNET)* to draw up a training module entitled *Money Matters* designed for workshops on gender budgets. GTZ developed a manual for training on Gender Responsive Budgeting, which has been designed for professional gender trainers.
- ✎ **Support for gender-differentiated budget planning at local level.** Many partner countries are currently in the throes of decentralisation. We advise local government bodies on how to ensure a gender balance in local budget planning.

Additional Information and Links

- Alexander, Patricia; Baden, Sally: Glossary on Macroeconomics from a Gender Perspective, BRIDGE/GTZ (Ed.), Brighton/Eschborn, 2000.
<http://www.ids.ac.uk/bridge> and http://www.gtz.de/gender_project
- Budlender, Debbie; Elson, Diane; Hewitt, Guy; Mukhopadhyay, Tanni: Gender Budgets Make Cents, London, 2002.
<http://www.gender-budgets.org>
- Gender Budgets, GTZ.
<http://www.gtz.de/en/themen/politische-reformen/demokratie-rechtsstaat/10530.htm>

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Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ) GmbH,
Programme “Promoting Gender Equality and Women’s Rights”
(Section 4222), Postfach 5180 / 65726 Eschborn / Germany
Text: Katrin Schneider / Contact Persons:
Christine Brendel – Phone: +49 (0)61 96-79 41 21 /
Fax: +49 (0)61 96-79 80 41 21 / e-mail: Christine.Brendel@gtz.de
Angela Paul – Phone: +49 (0)61 96-79 41 20 /
Fax: +49 (0)61 96-79 80 41 20 / e-mail: Angela.Paul@gtz.de

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