



GENDER BUDGETS

SUMMARY OF THE MAIN CONCEPTS AND OF CERTAIN INITIATIVES IN THE AMERICAS

1. Introduction

This document aim is to present a brief summary of the concepts relating to gender budgets, as well as the main projects and initiatives under way in the countries of the Americas.

2. The main concepts

Mainstreaming or gender-based analysis

- Constitutes a broader approach to the evaluation and comparison of the impacts of various legislative and governmental policies and measures on women and on men, in a large number of fields, such as health and education.
- Budgets are thus one of many aspects that may be subject to gender-based analysis.

Gender budgets

- Analysis of a budget from a feminist perspective, evaluating and comparing the impact of current expenditures on men and on women.
- Budgets are not neutral. They affect men and women differently according to the social roles assigned to them. "Budgets [...] determine the access of citizens to goods, resources and services. The allocation of budgetary resources is indicative of the government's priorities¹."

¹ Status of Women Canada. "Gender Budget: an Overview", Gender-Based Analysis Directorate, February 2000, p.4 translation).

Fundamentals of Gender Budgets

International agreements, such as the *UN Convention on the Elimination of All Forms of Discrimination against Women* (CEDAW) and the *Beijing Platform for Action*, are the cornerstones of gender budgets. The gender budget is one of the tools used to advance gender equality and equity and to ensure the fulfilment of government commitments toward women.

Beijing Platform for Action

The Beijing Platform for Action was developed at the United Nations (UN) Conference on Women in 1995. Two articles deal specifically with gender budgets.

Article 345: [...] This will require the integration of a gender perspective in budgetary decisions on policies and programmes, as well as the adequate financing of specific programmes for securing equality between women and men. [...]

Article 346: [...] Governments should make efforts to systematically review how women benefit from public sector expenditures; [and] adjust budgets to ensure equality of access to public sector expenditures [...].

Three objectives of gender budgets

- increase government awareness of the impact of budgets on women
- inform women of the different implications of government expenditures and revenues on men and on women
- increase the effectiveness of government resource allocation to foster gender equality

Characteristics of gender budgets (according to UNIFEM)

- These are not separate budgets for women, but rather an inclusion of considerations relating to gender equality.
- They foster the participation of women in the budgetary process.
- They involve the setting of new priorities rather than an overall increase in government spending.
- They involve a reorientation of programs within the sectors, and not a redistribution of the amounts allocated to each sector.

The seven main tools

These models, developed by Diane Elson, are considered as the reference tools to be taken into account in developing gender budgets²:

- Tool 1 - Gender-Aware Policy Appraisal: [...] looking at the policies and programmes funded by the budget from a gender perspective by asking: “In what ways are the policies and their associated resource allocations likely to reduce or increase gender inequalities?”
- Tool 2 - Beneficiary Assessment: [...] the actual or potential beneficiaries of public services are asked to assess how far public spending is meeting their needs as they perceive them.
- Tool 3 - Expenditure Incidence Analysis: [...] the gender distribution of public spending [...] by comparing the distribution of the benefits of public spending among women and men, girls and boys. Similarly it can suggest the gender impact of supposedly gender-neutral budget cuts.
- Tool 4 - Revenue Incidence Analysis: [...] The manner in which governments raise revenues and the level of revenues raised in relation to the need and demand for public expenditures can have different effects on women and men.
- Tool 5 - Gender-Disaggregated Analysis of the Budget on Time Use: [...] whenever cuts are proposed, the question should be asked: Is this likely to increase the time that men and women spend on unpaid care provision?
- Tool 6 - Gender-Aware Medium-Term Economic Policy Framework: The ultimate aim of gender analysis of national budgets is to incorporate gender variables into the models on which medium-term public expenditure planning is based.
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- Tool 7 - Gender-Aware Budget Statement: Any government can issue a gender-aware budget statement utilizing one or more of the above tools to analyse its programs and budgets and summarize their implications with a number of key indicators.

Gender budgets must be flexible, and the tools proposed by Diane Elson must be adapted to the context of each country, according to the available information and the government's commitments toward equity.

² Elson, Diane. “Accountability for the progress of women: women demanding action” in: Progress of the World's Women: *UNIFEM Biennial Report*, New York, United Nations Development Program (UNDP), 2002, pp. 116-118.

Approaches used by non-governmental organizations (NGOs)

Regarding gender budgets, particularly in Latin America, two types of approaches are used by NGOs.

- a governmental approach used by NGOs specializing in budgetary analysis (technical and analytical skills, economic knowledge and concepts)
- a rights-based approach used by NGOs specializing in the defence of women's rights (legal and political skills, mobilization, political action)

For the first group, gender budgets constitute another way of analysing the budget, and for the second group they are a concrete means of advancing women's rights and for mobilizing support and action. The initiatives undertaken in the Americas indicate to us that the collaboration between these two groups provides worthwhile results.

Alternative budgets: a means used by NGOs to present and recommend new spending structures, after having analysed the government budget from a humanitarian and progressive outlook, and after having drawn the attention of the public to the budgetary process.

Participatory budgets: At the local level, decentralization often provides opportunities for the populations to participate in the development and implementation of budgets which may include gender budget work.

3. Background of initiatives

Origin: Australia in 1984

The federal government assessed the impact of the budget on women, at all levels of government and in each government department, in consultation with the Office of the Status of Women, so as to demonstrate progress toward equality as set out in the National Agenda for Women. Rhonda Sharp was closely involved in this project.

Initiative taken up by the South Africans in 1996

The initiative was put forward by a group of NGOs in collaboration with the Joint Standing Committee on Finance, which produces the Women's Budget Initiative on an annual basis. This document includes an analysis of the impact of all departmental budgets on women and on men, and recommendations for new spending structures. One of the primary goals of this project, initiated outside the government, was to enable parliamentarians to raise issues relating to gender inequality in connection with budgets. Debbie Budlender is closely linked with this project.

Commonwealth Secretariat

The initiative was taken up by the Commonwealth Secretariat, in 1996, when it launched the *Gender Budget Initiative*, a gender-based analysis of the budget within various sectors, designed to involve the Finance departments. Diane Elson is closely linked with this project.

Owing to pleas by parliamentarians, South Africa became the first member-country to participate. "In 1997, the officials of the Commonwealth Secretariat responsible for the *Gender Budget Initiative* undertook consultations with the South African government departments and worked with the Department of Finance to adopt a budgetary analysis taking into account gender equity throughout the Department. Government officials considered their participation in the Commonwealth project as a follow-up to the work already done by the group responsible for the budget for women³." With their experience, South African NGOs contributed to the training of public servants.

The initiative was then carried forward by several other member-countries, including Barbados and Saint Kitts & Nevis.

UNIFEM

UNIFEM has been working for a number of years on the issues relating to gender budgets. This institution supports many initiatives and projects in 42 countries, and publishes a number of documents on this subject.

The Brussels Conference in October, 2001: This Conference, organized with the support of UNIFEM and the International Research and Development Council of Canada (IRDC) brought together parliamentarians from a number of countries, who shared their experience on this subject. The preponderant role of parliamentarians in gender budget initiatives was reaffirmed there.

4. Initiative in Québec

Gender-based analysis (GBA): a management approach

Gender-based analysis (GBA) is a management approach that is being experimented with in the Québec government, and which takes into account the different realities of women and men in public policies and services. This approach forms part of the ongoing policy and program development and review procedures, and of service delivery. It can lead to judicious advice concerning the impacts of a decision on both men and women.

Pilot projects

The pilot project in the department of Finance has made it possible to develop an analysis framework through which to measure the impact of various taxation policies on the situation of women and men. This work led to the publication of a document entitled *L'Analyse différenciée selon les sexes: le régime fiscal du Québec*, in September 1999.

"During the 2000-2003 stage, the experimentation is supposed to be deployed in seven government ministries: Finance, Health and Social Services, Culture and Communications, Education, Employment and Social Solidarity, Relations with Citizens and Immigration [as well as] Transport. The aim is to broaden the base established in the first stage, and to launch new pilot projects in diversified sectors"⁴.

³ Status of Women Canada. "Gender Budget: an Overview", Gender-Based Analysis Directorate, February, 2000, p.11. (translation)

⁴ Massé, Hélène, with the collaboration of Laberge, Michèle and Massé, Ginette. "L'Analyse différenciée selon les sexes au gouvernement du Québec: vers une mobilisation interne et des alliances stratégiques pour l'égalité", Lien social et Politiques,- RIAC, 47, *Le genre des politiques publiques: des constats et des actions*, Spring 2002, page 47.

5. Initiative in Canada

Gender-based analysis (GBA): fostering gender equality in all policies

“GBA is a tool to assist in systematically integrating gender considerations into the policy, planning and decisionmaking process [...]. Gender mainstreaming is a dual approach that implies the reorganization, improvement, development and evaluation of all policy processes for the purpose of incorporating a gender equality perspective into all policies, at all levels and at all stages, by the actors normally involved in policy-making.⁵”

Although Canada does not have any specific initiative on gender budgets, “the Canadian Government has already been committed for a very long time to analysing the repercussions of policies on women from the beginning of the policy establishment and decision-making processes⁶.” Statistics Canada provides a large amount of data broken down by gender.

Two NGOs have made their mark

The Women’s International League for Peace and Freedom (WILPF): Published in 1993, *The Canadian Women’s Budget* provides a critical comparison of federal expenditures devoted to social programs and services and to national defence. This document promotes women’s rights and peace in the framework of a budgetary exercise.

The Canadian Centre for Policy Alternatives (CCPA): Published every year, a few weeks before the tabling of the federal budget, the Alternative Budget presents a budgetary strategy with a view to reducing and eliminating the deficit, stimulating more economic growth, creating more jobs and fostering greater equality and social justice. In 1998, the Alternative Budget included a review of the way to incorporate gender in the budget. Although these documents do not constitute gender budgets, the one published in 2001 included a specific chapter on this issue for the first time. One of the eight principles of the Alternative Budget is economic equality between women and men.

6. Initiatives in the Americas⁷

6.1 Brazil

Participatory budgets

Brazil is noted, among other things, for its policy on participatory budgets, which fosters the involvement of citizens in the budgetary planning process. Even though participatory budgeting does not necessarily involve gender-based analysis, women’s movements are actively involved in this process. A study by CIDADE in Porto Alegre demonstrated that these budgets have positive impacts for women, by making way to increase their involvement in the budgetary process.

⁵ Status of Women Canada. “Information Kit on Gender Based Analysis (GBA)”

⁶ *Ibid.*

⁷ Summary of the text: Borges Sugiyama, Natasha. “Gendered Budget Work in the Americas: Selected Country Experiences”, October 2002. (translation)

Budgetary analysis with NGOs

In Brazil, civil society has long been using a humanitarian perspective in budgetary analysis, as a tool for political mobilization, but not necessarily in a gender-based context. There are a large number of NGOs that specialize in budgetary analysis at the local level, such as the *Centro de Assessoria e Estudos Urbanos* (CIDADE) in Porto Alegre and the *Instituto Brasileiro de Análises Sociais e Econômicas* (IBASE) in Rio de Janeiro, and at the national level, such as the *Instituto de Estudos Socioeconômicos* (INESC) in Brasília.

The *Centro Feminista de Estudos e Assessoria* (CFEMEA), one of the most firmly established feminist organizations in Brazil, began to examine the impacts of the budget on women in 1995. Among other things, it worked directly with the women's caucus in Congress. It has worked primarily on the sectors identified at the Cairo and Beijing Conferences, health and reproductive rights, two sectors in which it had important contacts with the government. In addition to examining the process of developing the budget, it also analysed its implementation and that of public programs, in order to ensure that the government's commitments would be reflected in the public services provided. This study also revealed that the imprecise nature of budgetary policies aimed toward women would make room for a redistribution of these funds toward other sectors. The results are published in the monthly journal *Fêmea*, which is sent to women researchers, parliamentarians and defenders of women's rights. CFEMEA plans to apply the gender budget approach in municipal program implementation, in collaboration with local NGOs.

6.2 Chile

Two main projects

Two main projects are currently under way. One is being undertaken by *Servicio Nacional de la Mujer* (SERNAM), an autonomous organization of the Chilean government working for the defence of women's rights, and the other by *Hexagrama Consultoras*, a civil society group.

The SERNAM project: in 2001, with the collaboration of the Department of Finance, SERNAM arranged to have all government agencies issue a gender-based analysis of their policies (currently under way). SERNAM is also developing gender indicators for budgetary analysis, and is training public servants.

The Hexagrama project: In 2001, Alejandra Valdés and Elizabeth Guerrero initiated a study on gender and budgets (revenues and expenditures) of municipalities in four different regions in order to underline gender inequalities in public spending at the local level. They observed that the municipalities have little information on program implementation and that the public servants are not accustomed to providing information to civil society. These two women pioneers thus developed a series of recommendations and guidelines in order to develop gender indicators for the analysis of municipal spending and revenues.

6.3 El Salvador

The *Movimiento de Mujeres Melida Anaya Montes*, a women's NGO, is working on the issue of budgets and has produced a guide on gender budgets.

On August 15, 2003, the first initiative was undertaken to study the national budget from a gender-based perspective, involving all women parliamentarians and the representatives of civil society, led by the *Movimiento de Mujeres Melida Anaya Montes*.

6.4 United States

The United States is one of the few countries that have not ratified the UN Convention on the Elimination of All Forms of Discrimination against Women (CEDAW). The city of San Francisco has, nevertheless, incorporated the principles of this agreement in its municipal governance.

The documentation consulted did not enable us to identify any U.S. initiatives on gender budgets.

6.5 Mexico

Projects by Mexican organizations

Two NGOs are carrying out gender budget projects: FUNDAR: *Centro de Análisis e Investigación* (research, training, dissemination of information and direct action in order to increase citizen participation in the determination of public spending) and *Equidad y Género: Ciudadanía, Trabajo y Familia* (a large network of women's rights defence groups).

In 1998, *Equidad y Género* organized a first workshop on gender budgets, which led to a first budgetary study focusing on the theme of reproductive health. Since 2000, the collaboration between FUNDAR and *Equidad y Género* has produced several studies, including:

The budgetary study on reproductive health made it possible to analyse public spending aimed directly toward women. The main problems encountered concern the lack of data broken down by gender, and the invisibility of gender in the Mexican budget. The results demonstrate that only 0.03% of public spending is directed toward women. Based on this finding, a broad media campaign was undertaken in order to persuade the government to devote a greater share of the budget to women and to provide other types of information on the budget, as well as data broken down by gender, which may be used to analyse the impacts of budgetary policies on women, that are not specifically addressed.

The analysis of poverty elimination programs: This other study examines the application of international agreements signed by Mexico. It makes it possible to:

- 1) identify the commitments made by Mexico at the Cairo and Beijing Conferences;
- 2) identify funds allocated to poverty elimination programs since 1998;
- 3) categorize the information on each program;
- 4) develop gender-based assessment criteria, such as fulfilment of the needs of women, their participation in the decision-making process, and the recognition of unpaid work time.

The popularity of these programs has enabled these two NGOs to gain credibility in public debates. The absence of data broken down according to gender did not allow for assessment of the impacts of other government programs on women and on men. These two NGOs developed a gender-based budgetary analysis method suitable for Mexico, in order to produce credible and persuasive results for the government and the media.

These two NGOs are also working in collaboration with the *Instituto Nacional de las Mujeres* to develop a gender budget guide, which will be required on the part of each government department.

The other activities of these organizations concerning gender budgets aim to training women (*leaders*), including women parliamentarians interested in women's rights, and collaboration with four federated states (Coahuila, Chiapas, Puebla and Querétaro) as well as technical assistance and the organization of workshops in those states.

6.6 Peru

A local-level budget project

Virginia Vargas, of Peru, is working on gender budgets in the Andean region, in the framework of the UNIFEM Program on Women's Economic and Social Rights in the Andean region. Only those municipalities may participate whose authorities have demonstrated a willingness to collaborate with local civil society groups and to contribute to improving equity, and which fulfil certain criteria, such as a high proportion of female representation within the local government.

In Peru, the municipality of Villa El Salvador was selected for this project, since it has a long tradition of community-based management and activism, and a very active civil society, including feminist organizations.

The municipal government of Villa El Salvador has implemented a participatory budget since August 2000, based on the Porto Alegre model, after having held a Conference during which the different participatory budget projects of Brazil were evaluated and compared. The model chosen was adapted to the Peruvian community, among other things, by adding a gender-based analysis of the impacts of budgets.

The *Centro Flora Tristan* has been working with elected women officials, and provides training on economic and social rights and on budgeting in 40 municipalities. It has published a study entitled *Mujeres y Gasto Publico*.

6.7 Conclusions on the initiatives in the Americas⁸

Ms Natasha Borges Sugiyama concludes her book with a few statements of fact:

- work to improve the transparency of budgetary processes, even if access to information remains difficult.
- increased use of Internet allows for easier access to governmental budget information.
- most initiatives are done at the local level (participatory budget and collaboration with NGOs and local researchers).
- a long tradition of the commitment by women's movements and a major effort toward mainstreaming in government agencies, through the creation, among other things, of government organizations responsible for the status of women.

⁸ As formulated by: Borges Sugiyama, Natasha. "Gendered Budget Work in the Americas: Selected Country Experiences", October 2002. (translation)

- those government organizations responsible for the status of women are in favor of links between government agencies responsible for budgeting and women's groups, but sometimes lack the authority and resources needed to influence governance practices.
- even though a number of budget analysis initiatives do not specifically concern gender, they have favored the debate on the budgetary process, as well as greater transparency and the development of expertise in budgetary analysis.
- the importance of being creative in adapting the tools and models to each country, region or municipality, and especially, to the available data.
- implement a gender budget that is flexible, so as to allow for adjustments throughout the project.
- a number of initiatives in the Americas have begun with a pilot project (in one sector, at one level of government).
- a number of initiatives in the Americas constitute short-term research projects, which are not necessarily inserted within the mission of the organization, nor accompanied by other activities such as participation in debates on the budget and long-term follow-up, which limits their influence on government decision-making.
- it takes a number of years for a civil society group to acquire sufficient credibility and recognition to influence government policy.
- these initiatives have made it possible to broaden knowledge on the subject, as well as to increase the number of workshops, seminars, meetings and training programs. They have also served to inform populations, parliamentarians, governments and other groups of civil society.

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