

# A Profile of Country Activities

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*When writing these country profiles, I endeavoured to contact people involved in all the initiatives I heard or read about. If the report contains errors of fact or errors of judgement, I apologise for these. Many thanks to Alcinda Abreu, Haroon Akram-Lodhi, Pat Alailima, Melanie Beresford, Letty Chiwara, Lorraine Corner, Diane Elson, Simel Esim, Barbara Evers, Regina Frey, Pregis Govender, Marge Guerrero, Guy Hewitt, Sue Himmelweit, Helena Hofbauer, Kareen Jabre, Wanjiku Kabira, Joanna Kerr, Jennifer Klot, Ann Lehman, Mascha Madorin, Gabriele Michalitsch, Rebecca Pearl, Mary Rusimbi, Donna St. Hill, Manju Senapaty, Elizabeth Stiefel, Rhonda Sharp, Shirin Shukri and Kaniz Siddique for the invaluable information they provided.*

## Introduction

The methodology used to prepare these country profiles was primarily a desk review. The review included both official and unofficial documents collected during a lengthy involvement in the area, as well as documents provided by the Commonwealth Secretariat and UNIFEM. Information was also sought from people involved in the different initiatives.

In many cases the information received was about planned activities rather than activities already carried out. These profiles concentrate on what has been done rather than what is planned. It is important from the outset to be aware that there is often a significant gap between plans and achievement. Although this occurs in many areas of development activity, it must be especially factored in when the activity is in an intensely political area where powerful stakeholders, and political events more broadly, often determine what can be achieved and when. This is an important consideration in planning. It should be noted that the profiles were written at the end of 2000 and, in some cases, there may have been developments since then.

These profiles also focus quite narrowly on initiatives that explicitly involve both gender and budgets. There are clearly lessons to be learnt from budget initiatives without a specific gender focus. Nilufer Cagatay *et al.* (2000) discuss some of these lessons in their report of the proceedings of the workshop on pro-poor, gender- and environment-sensitive budgets. There are also lessons to be learnt from gender initiatives that do not specifically focus on the budget. In the confines of this review, however, the gender responsive budgets on their own present sufficient challenge.

## Profiles by Region

### Africa

**BOTSWANA** A representative of the United Nations Development Programme (UNDP) in Botswana attended the 1998 Southern African workshop organised by UNIFEM in Harare. Subsequently, together with the Botswana Gender Ministry, UNDP Botswana organised a workshop on gender and budgets for local level planners, researchers and statisticians. This was part of a series of gender sensitisation workshops organised by the Gender Ministry for different groupings. GRB analysis was probably not included in any of the other workshops.

**KENYA** The Canadian International Development Agency (CIDA) provided funding for a three-year initiative in key Kenyan ministries aimed at mainstreaming gender in public investment plans and recurrent expenditure, gender responsive planning, collecting gender responsive data, developing ministry-specific tool kits and translating the Beijing Platform for Action into a policy matrix. The Collaborative Centre for Gender and Development has played a key role in the exercise. The legal NGO, International Federation of Women Lawyers (FIDA), has also played a role.

University lecturers who are members of the Centre served as consultants and coordinators of the project. The NGO coordinator was a specialist in gender and education and learnt the importance of identifying and networking with specialists from other institutions. Those the project has worked with include planners, economists, analysts, statisticians, researchers

and professionals in a variety of disciplines. To date the work has focused on expenditure at the national level. DFID, SIDA and the Royal Netherlands Embassy have expressed interest in funding a further three-year programme that will look in more detail at engendering the national (and perhaps sub-national) budget/s and the Poverty Reduction Strategy Paper (PRSP).

The chosen ministries for the first three years were Agriculture, Health, Education, Public Works, Industrial Development and Local Authority. The entry points were the ministries' gender focal points but the economist planners in target ministries together with a researcher did much of the analytical sectoral work. The list of issues covered suggests that the gender responsive data element focused mainly on internal issues such as participation of women and men in ministries, training opportunities, use of skills, remuneration and benefits. However, the broader analysis is more externally focused.

The Centre and FIDA-Kenya together produced a concept paper entitled 'Translation of the Beijing Platform for Action into the 1998/99 Kenya National Budgetary Process'. Gender trainers from the Centre developed frameworks for engendering the public investment programme (PIP) and ran a half-day workshop for officers responsible for the PIP. The Centre also developed a concept paper on restructuring the civil service, salaries for which account for 80 per cent of the budget in most sectors.

The initiative received strong support from the previous director of planning and current permanent secretary. However, at a lower level already overworked civil servants were often unavailable when the Centre needed them. Another reported obstacle was that the targeted officials had to consult their superiors before they could release information or participate in other ways. There were further difficulties with some senior officials when draft reports were submitted.

Despite these difficulties, in the first year there were already substantial achievements. These included the incorporation of some aspects of the project's concept paper in the 1998 budget and workshops with people from outside government. Later, the Centre lobbied to ensure that a gender expert was seconded to the team responsible for developing the PRSP. As a result

gender was identified as one of the thematic areas and the Centre was asked to provide expertise and to house the Nairobi District PRSP secretariat. The Centre is also working with other women's organisations to ensure women's participation at all stages and levels of the PRSP process.

As is clear from the above, activity has not been confined to civil servants. The Centre, together with the women's organisation Friends of Esther and Deborah, organised a workshop on behalf of the Kenya Women's Political Caucus in June 1997 shortly before presentation of the 1997/98 annual budget estimates. In 1998 members of the Women's Political Caucus participated in a post-budget day group analysis of the gender responsiveness of the national budget. Members of the project participated in and distributed materials at the Economic Reform Forums organised by government.

In a separate venture, the Inter-Parliamentary Union organised a regional workshop on 'Parliaments and the budgetary process including from a gender perspective' in Nairobi during May 2000. The workshop was organised in collaboration with UNIFEM and the Commonwealth Parliamentary Association and participants were invited from some 20 countries in Anglophone Africa. Of these countries, at least nine have a GRB initiative of some kind. Marilyn Waring of New Zealand and Mbaye Diouf of the United Nations Economic Commission for Africa (UNECA) dealt with the gender aspects. The regional seminar was preceded by a three-day workshop for Kenyan MPs. The three-day workshop did not specifically focus on gender issues although the summary of proceedings notes that the budget 'should also provide adequately for marginalised groups such as women and the handicapped. Some participants felt this was not currently the case' (Inter-Parliamentary Union, 2000b).

**MALAWI** CIDA is driving the very new GRB initiative in Malawi. The initial idea was that the initiative should be situated within government, which is CIDA's primary partner in Malawi. The first step was to commission a Malawi Gender Aware Country Economic Report, based on Diane Elson's theory. The next step occurred in August 1999 as part of a multi-donor consultancy on macro financial support to the country. The gender component, although seen as peripheral

to the main focus by almost all the agencies, provided the opportunity to test the feasibility of conducting GRB analysis across key ministries through documentary and interview techniques. The report suggested that such analysis was definitely feasible, but that CIDA's initiative should focus on non-governmental rather than government players in the first stages. This recommendation arose from a feeling that introducing yet another donor-driven change in the midst of the many other reforms happening in government at that time would hinder interest and sustainability.

The recommendation received support in further consultations with both NGOs and government. These consultations revealed that neither side felt comfortable about working together. From the government side, as in many other countries, there was some suspicion about NGO intentions. From the NGO side, there was a fear of being stifled and threatened.

The project has been fairly slow to get off the ground, but is still on the agenda. A planning meeting was held in mid-2000 and a shorter, simpler and updated version of the 1999 research has been prepared to popularise the idea. The South African workshop materials (see below) have also been partially adapted for use in planned training activities.

The Ministry of Gender Affairs, Youth and Community Services is very interested in the initiative. Indeed, the recently developed National Gender Policy commits government to developing a GRB initiative. There is interest from players in parliament, including the Finance Committee that had sight of the 1999 report. From the side of the Ministry of Finance there is support for the usual non-gender-specific budget reforms, including public participation in the budget process. To date the main form of public participation appears to be the Budget Breakfasts that occur shortly after the budget is announced. Participants in these breakfasts complain that they serve little real purpose as they occur too late in the process to have an impact.

**MAURITIUS** In February 2000, UNDP Mauritius organised a workshop on gender responsive budgets for Mauritius, Seychelles, Comoros and Madagascar. The initiative was inspired by the two regional workshops organised by UNIFEM

in Harare in late 1998 and late 1999. However, unlike the Southern Africa workshops, participants in the Indian Islands workshop were primarily from government.

In Mauritius, the Ministry of Women, Family Welfare and Child Development took the initiative further. Initial work has been done on four sectoral ministries – Education, Social Security, Health and Agriculture – using the Commonwealth manual method as the basic format. Small teams from each of the ministries compiled draft reports on this work.

**MOZAMBIQUE** The Swiss Development Corporation provided financial support for the Mozambique initiative. One of the first steps was the translation by Gedlide, a gender NGO, of most of the chapters of the first South African *Women's Budget* book into Portuguese. A second step was the organisation, together with the Ministry of Finance, of a two-day workshop for Finance officials. Organisation of the workshop and subsequent work was greatly facilitated by the fact that the two top officials in the Budget Office were women, and both were keen to integrate gender in the government budget.

After the workshop the head of the Budget Office collected statistics on the numbers of women and men in the public service. These were included in the public documentation for the budget tabled in 1998. In September 1998, the Ministry officials sought to develop a gendered analysis of budgets in four key ministries – Education, Agriculture, Health and Labour. One challenge was the very different levels of detailed and disaggregated data available in different ministries. A second challenge was the very limited information available on donor funding. This problem was particularly serious given that donor funds account for such a large percentage of the government's budget in Mozambique.

At present there appears to be limited activity within government. At least part of the reason lies in the departure of the two top women in the Ministry of Finance. Gedlide has continued to work with civil society. Activities include hosting a seminar with parliamentarians who are members of the Commission on Social Issues, Gender and Environment, and general work on gender within the Ministry of Health at national and provincial level. In 2000 the Ministry of Agriculture and Rural

Development for the first time allocated a specific budget for activities related to gender issues.

**NAMIBIA** Namibia's Gender Policy of November 1997 states that gender should be integrated into all government policies, processes and programmes. This statement provided the opening for the idea of gender-sensitive budgets. The Swedish International Development Cooperation Agency (SIDA) supported the process on the basis of their existing programme of support to the Namibian Ministry of Finance and the presence of a long-term consultant in the ministry.

The analysis in Namibia focused on two ministries: Education and Culture, and Agriculture, Water and Rural Development. The report also included a chapter on gender and economics which spoke about the shift from women in development (WID) to gender mainstreaming; paid and non-paid work; equality and efficiency; gender and macroeconomics; and gender and state budgets.

The initiative does not appear to have gone further than introducing the concept of gender responsive budgets. However, towards the end of 2000 the Namibian Ministry of Women Affairs and Child Welfare was looking for a consultant to conduct training for around 30 financial advisors in the different ministries and departments of government.

**RWANDA** Following the establishment of a UNIFEM-supported Gender Desk in the Rwanda Parliament, a seminar on gender responsive budgets was organised. The seminar resulted in specific budget allocations for women's activities in the most recent budget. There has, to date, been no analysis of the extent to which the rest of the budget is gender-sensitive.

**SOUTH AFRICA** The South African initiatives are closely linked to the end of the apartheid era, and the introduction of a Constitution and ethos that put race and gender discrimination among the most important issues to be tackled. The idea of examining budgets from a gender perspective was raised during the negotiations that preceded the first democratic elections. It was introduced officially when Pregs Govender, one of the more than 100 new women MPs, proposed it during the budget debate that followed soon after the elections in 1994.

The Women's Budget Initiative (WBI) was established in mid-1995. It was a collaborative venture of the Gender and Economic Policy Group of the parliamentary Committee on Finance and two policy-oriented research NGOs. The initiative was seen as non- or extra-governmental on the understanding that MPs are meant to represent civil society and monitor and direct government. The organisers hoped that by linking researchers and MPs, the researchers could be assured that their work would be taken forward into advocacy while the MPs would have a solid basis for their advocacy. In addition, the approach from the start was for the core WBI members to draw in others to participate as researchers and reference people. Further, they did not restrict themselves to economists, but rather promoted an inter-disciplinary approach and as wide as possible spreading of the skills and ideas.

The South African group was aware of the Australian and Canadian initiatives, but drew also on trade union experience of analysing budgets from a worker perspective during apartheid. From the outset, there was a clear policy of integrating gender analysis with an analysis of race, class, geographical area and other axes of disadvantage.

In the first year the initiative was funded through the core funding of one of the NGOs, sourced from the US Agency for International Development (USAID) and Ford Foundation. In subsequent years the Initiative has received support from the Netherlands Embassy, Commonwealth Secretariat, Ford Foundation, UNIFEM, Charles Stewart Mott Foundation, Oxfam-Canada/NOVIB Gender and Development Fund, and GTZ Pilot Project Gender.

In the first year the WBI analysed a limited number of national votes, public sector employment and taxation. The votes were chosen so as to span both social and economic sectors to make the point that there were gender issues everywhere. By the end of the third year all 26 votes of the national budget, as well as some related issues, had been covered. In subsequent years, the analysis extended to local government, donor funding, revenue and intergovernmental relations.

The original research was published as a series of books. A *Money Matters* series then simplified and shortened the material



to make it accessible to a second-language speaker with about ten years of education. A set of workshop materials was also developed in order to reach those who seldom read. The WBI developed these materials together with the Gender Education and Training Network. The partners have recently signed a contract with UNIFEM to work with people from other Southern African countries to adapt the materials for regional use.

In addition to the extra-governmental WBI, South Africa served as the first pilot for the Commonwealth Secretariat initiative. For two years, a consultant worked with the Department of Finance preparing gender-related material, which was incorporated in the budget documents tabled on budget day. The Commonwealth Pilot also included some other activities, such as input on gender at meetings, training in one of the provinces and preparation of a discussion on gender responsive budgets. Subsequently, another province independently took up the idea of gender responsive budgeting and organised input for their most senior decision-makers and training for middle-level officials in all departments.

At present, the government initiatives are either dormant or dead. There is a range of reasons for this, some of them not directly related to gender responsive budgets or even gender. However, one of the more direct reasons has been the departure of supportive key players during the early months of 2000.

More generally, possibilities of influencing government are more limited in 2000 than they were in the early years of the new democracy. In another context, Marion Stevens (2000) uses the term 'soft boundaries' to refer to the easy access which South African activists had to people in government and parliament after the 1994 elections given that all had so recently been together in the struggle against apartheid. Several years later the boundaries have hardened, and government itself is no longer so ready to do everything differently. Further, as in many other countries, central government officials are struggling to cope with implementing a number of other new procedures and many have no time for what they see as 'extras'.

The idea of GRB analysis has, however, become quite well known in the country. Some organisations without direct

connections to the WBI players have established their own initiatives or called on the WBI to provide assistance. The WBI has also inspired initiatives that look at the impact of the government budget on other groups, such as children and the disabled. One big difference between these initiatives and the WBI is that they employ a simple 'special interest group' argument whereas the WBI argues that it is the conventional approach to economics, and in particular the blindness to the care economy, that is responsible in large part for policy and budgets not being gender responsive.

**TANZANIA** The Tanzanian GRB activities were initiated by an NGO, the Tanzanian Gender Networking Programme (TGNP). The NGO drew inspiration from both the South African and Australian initiatives. At this stage it is one of the most developed initiatives with activities spanning government and civil society.

Work began in September 1997 at a workshop which brought together TGNP's allies in the other organisations that form part of the Feminist Activism Coalition (FemAct) as well as a few gender activists from government. Over the ensuing years TGNP has undertaken or commissioned research on four national sectoral ministries (Education, Health, Agriculture, and Industries and Commerce), on the central Finance Ministry and Planning Commission, and on the budget process. It has also done some research in selected districts. For most of the sectors TGNP teamed a government official from that sector with a non-governmental researcher. This approach was part of their strategy of reaching key actors, creating openings and building alliances. The findings of the research have been distributed as mimeos and should appear shortly in book form. TGNP has also produced a more popular and shorter version of some of the research in 'Budgeting with a Gender Focus'. The booklet is currently being translated into Kiswahili.

Approximately a year after TGNP embarked on their project, SIDA started funding a parallel exercise in the Ministry of Finance. In 2000, SIDA and the government recognised that TGNP was well placed to act as ongoing consultant to the Ministry in respect of gender responsive budgeting. Six pilot ministries were chosen, many of them matching those in which

TGNP had conducted research. Training workshops and backstopping centred on the newly introduced medium term expenditure framework (MTEF). Budget officials in selected ministries were already receiving general training in how to follow the steps needed for this type of activity. TGNP was invited to attend the initial training. On the basis of that experience they designed and delivered workshops that showed how to integrate gender in each step. This was later formalised into a 'checklist' in response to constant demands for 'tools'.

The collaboration seems set to continue and expand. In October, UK consultants were commissioned by the Ministry of Finance to plan a three-year Public Financial Reform Management Programme which would span all the institutions involved in financial management, not only the budget office. TGNP was commissioned to contribute their gender expertise and found openings for gender-related work in virtually all the institutions concerned. TGNP had also been invited in to related government processes such as the public expenditure review (PER) and the Poverty Reduction Strategy Paper (PRSP).

The relative success of the Tanzanian initiative can be partly explained by TGNP's approach of building alliances from the start. The fact that NGOs and government are now working together is no small feat given past mistrust on both sides. It is particularly remarkable given that the Ministry of Finance is a key player.

One of the problems in Tanzania is the weakness of the budgeting process. The budget office is currently pushing the mtef with some force, and the exercise is extremely detailed. Yet there is some cynicism among budget officials, which can result in a lack of energy in taking the whole exercise, including the gender elements, seriously. Firstly, the country operates according to a cash budgeting system where most Ministries get far less than they have budgeted for in that they are allocated each month only as much as has been collected in revenue. Secondly, there is a sense that the MTEF, alongside performance budgeting, may be yet one more passing fashion imposed by donors and consultants.

TGNP did not plan the current path at the outset. The documents and speeches of the first year speak of the budget

initiative more as a lobbying programme situated in civil society. The outside government initiative has, however, encountered some problems. For one thing, the other FemAct partners have tended to leave the initiative to TGNP and to concentrate on their own activities. For another, some gender activists have criticised TGNP for getting too close to government, and for failing to address the larger macro-economic issues.

The potential for cooption was seen from the start. Already in 1998 a TGNP representative reported that 'the strategy is to work together with actors in the government machinery, while keeping a distance so that they do not hijack our agenda and our course of action' (Adelstal, 1998:6). The success of collaboration to date and TGNP's apparently ability to maintain its independence have persuaded some of the critics that TGNP has chosen the correct path

Another important aspect of the Tanzanian initiative is its recognition that equity is not only about women. The initiative aims for a 'more people-oriented development strategy and equitable allocation of resources'. The materials and approach speak repeatedly about 'women and poor men'.

The Netherlands Embassy funded the initial TGNP initiative. Most of the government work is funded by SIDA. TGNP is now paid for most of its government-related interventions.

**UGANDA** The Ugandan initiative has been spearheaded by the NGO, Forum for Women in Democracy (FOWODE). FOWODE was established by women MPs and has strong links with the special interest groups caucus in parliament which brings together those occupying reserved seats for women, people with disabilities, youth and workers as well as women who have won 'open' seats. The GRB project started in mid-1997 with input and a practical session at the Women's Caucus meeting to review its first year in parliament. Already at this stage FOWODE had undertaken activities in the area of gender and macroeconomics, for example through training, policy dialogues and the publication of short 'issue briefs'.

Since 1997 FOWODE has commissioned two rounds of research at the national level, as well as a first round of research in two districts. The national research focuses on Education, Health,

Agriculture and the Ministry of Finance and Economic Planning. Gender researchers from Makerere University have done the research with support from reference people from the ministries concerned. This has established a new relationship between activists and government in place of the previous suspicion. The findings have been fed directly back to politicians in the form of issue briefs, memos and papers which have given gender issues 'credibility and respect', rather than having them discussed only as 'sentimental or moral issues' (Byanyima, 2000). The national research will soon also be published as a book. Meanwhile, a simplified version of the first report, 'Sharing the National Cake', is being used by NGOs to spread gender analysis ideas.

The FOWODE initiative has been facilitated by ongoing changes in the government process that attempt to increase inclusiveness and transparency. The process now provides for significant involvement of sector working groups that include civil society representatives. There is widespread acceptance of the need to focus on poverty alleviation and strong attempts to ensure widespread public participation in determining poverty-related objectives. There are also initiatives to increase the decision-making powers of parliamentarians in respect of budgets. However, the draft expenditure estimates and policy recommendations continue to be subject to approval by the World Bank and International Monetary Fund before presentation to cabinet and parliament.

For the research at the local level, FOWODE has, as at national level, gone for an inclusive approach. The workshop that laid the basis for the first research brought together local government officials, MPs, councillors, NGOs and researchers. The district-level research is part of FOWODE's support for women elected at this level. The founders of FOWODE were members of the Constitutional Assembly where they succeeded in achieving a one-third quota for local government. The current support activities are intended to ensure that the women elected have the necessary skills to influence local government decision-making. FOWODE also sees the current moves to decentralise as potentially advantageous to women in that the majority will not, because of poverty and illiteracy, have a direct influence beyond the local level.

FOWODE's training and support provides local councillors with strategic skills to ensure that, while still a minority, they can influence the majority. It also attempts to move them beyond a frame of mind where they see themselves as personally responsible for solving constituents' problems to the realisation that their role is to ensure that government is transparent, accountable and delivers according to citizens' needs. There have been discussions as to whether this training should be women-only or instead include men so as to avoid being 'confrontational'. Overall, FOWODE tends to support women-only or women-dominated training so as to build self-confidence and assertiveness.

In terms of the budget, in the first round of training women councillor participants focused their attention on the women's vote, and a discrete amount of money which many councils set aside for women. In further training FOWODE hopes to move them to see this vote as a 'diversion' and to concentrate instead on looking at the impact of all other expenditures and revenue.

Surprisingly, given the strength of the initiative and the receptive environment, FOWODE experienced some difficulty in obtaining funds. Some of the early work was sponsored by UNDP. The current district level work is supported by DANIDA.

Beyond the FOWODE initiative, the Association of Uganda Professional Women in Agriculture and Environment (AUPWAE) carried out studies on resource allocation at institutional and family level in four sub-national areas. Winrock International Program funded this as part of a broader East African project. Methods included focus group discussions; interviews with representatives of women in local councils, disabled and a few others; secondary data collection; participatory rural appraisal; and other techniques. Further, in October 1999 the Ugandan Debt Network organised a workshop on gender advocacy and budgets that brought together representatives of several NGOs, including FOWODE and AUPWAE.

**ZAMBIA** The UNIFEM workshop on gender responsive budgets held in Harare in late 1998 was attended by a team of Zambians, primarily from government. Before the workshop the gender machinery discussed the idea with the Ministry of Finance. The process was facilitated by the inclusion in the

macroeconomic policy framework of a directive on gender equity in development and poverty alleviation.

Activities since the workshop have included training for gender focal points, planners in sector ministries and women parliamentarians. Outside of government, the NGO Coordinating Committee held a workshop to discuss how gender issues could be addressed in the 2000 budget. At this stage there is a perception on several sides that the key need is for capacity building. The Netherlands Embassy has committed itself to supporting the initiative. The first workshop, planned for early 2001, will focus on the health sector.

**ZIMBABWE** A team of Zimbabwean researchers was funded as part of the Gender and Economic Reform in Africa (GERA) initiative to conduct GRB analysis. By mid-1999 the team had done preliminary fieldwork in the form of beneficiary assessments in rural and urban communities on the actual and potential benefits people saw from the national budget process. The team was also interested in the 'invisible' transfer of costs imposed by changes in education and health policies. The final report has not yet been submitted to GERA.

Currently the most active player is the Women's Action Group, which has been trying to ensure that gender concerns are considered in the 2001 budgeting process. The Group is particularly concerned about allocations for the health and education sectors. The regional UNIFEM office has been participating in this initiative and one of the UNIFEM staff members presented a paper at the parliamentary pre-budget seminar. The Women's Action Group and the Gender Forum plan to conduct an analysis of the 2001 budget in the hope that this will stimulate a bigger lobby for gender responsiveness in the 2002 budget process. The Gender Forum was initiated by the UN Gender Working Group and provides the opportunity for individuals and representatives of NGOs, government, UN agencies and other donors working on gender and development to discuss current issues and share experiences.

## The Americas

**BARBADOS** Barbados was the third of the Commonwealth Secretariat pilots. One of the important enabling factors in this

country was the coordination by a senior level official in the Ministry of Finance. This person spearheaded the initiative in the country. Ultimately, however, his position as secondee could have brought some weaknesses in that he could too easily be labelled as an 'interfering outsider'.

The initiative began with a visit by a Commonwealth delegation to meet with key players. The second step was a workshop in April 1999 involving about three representatives each from the Ministries of Agriculture and Rural Development, Health and Environment, Social Transformation, Education, Youth and Culture, and the Attorney General. The workshop used the basic methodology developed during the Sri Lanka training and reflected in the Commonwealth manual. Participants thus developed the skeletons of reports for each sector on the basis of gender-targeted, employment equity and mainstream expenditures.

Participants were expected to complete their reports after the workshop so as to produce a composite publication. After concerns around time and work pressure, the Commonwealth Secretariat commissioned a Barbadian based in London to complete the report. The final product is a solid piece of research that elaborates at some length on the skeleton produced in the workshop. However, the Attorney General section, which covers the police and thus gender violence, is missing from the report. This is disappointing as it is one of the few exercises to include the policing agency.

The report was written by the consultant, but with support from the ministries. Its tone is fairly academic and probably more attractive to the sophisticated gender analysts in the country than to government officials. There was some attempt to involve or inform gender activists about the initiative, but with limited success. At least one of the activists seemed to think it more useful to engage in this type of analysis within networks such as Development Alternatives with Women for a New Era (DAWN) rather than engaging with government.

**BRAZIL** Agende, a Brazilian organisation, has worked on policy and budgets with central and federal government in the country, focusing on the ministries of Justice, Health and Work and Employment. The methodology which government uses to



formulate budgets has changed over the life of the project. This has added to the usual challenges of budget analysis and has resulted in a special focus on process issues. Agende has not focused specifically on gender, but has raised gender-related issues in the course of its policy and budget analysis.

**CANADA** In 1993, the Canadian branch of the Women's International League for Peace and Freedom developed a women's budget in celebration of the League's 75th anniversary. The publication is based on five principles, all of which have a clear link with war, the military and defence.

The Canadian government does not have a formal GRB initiative. However, in the early 1990s the Status of Women Canada (SWC) identified the taxation of child support as a gender issue. The institution worked with taxation and family law experts to develop guidelines and options for new policy and consulted with outside groups mobilising around the same issue. Eventually a legal challenge resulted in an official task force. swc itself and outside organisations did not have the data and capacity to model the different options. However, by working with line departments, they were able to come up with a woman-friendly option that was accepted as policy (Karman, 1996: 10-1).

Although it has not consistently focused on gender, the outside government Alternative Federal Budget (AFB) in 1998 included a review of how, analytically and practically, gender could be incorporated in budgets. The review did not examine to what extent the AFB had achieved such integration in the past. The initiative itself acknowledges weaknesses in this respect but notes that there have been 'considerable efforts' to bring in a gender perspective. Thus, one of the eight basic principles underlying the AFB is 'economic equality between men and women' (Loxley, 2000). Up until recently, there was a conscious decision not to have a separate discussion on gender, but rather to insist that it be integrated in other policy sections. There have also been ongoing attempts to ensure that sufficient women participate in the project.

In an attempt to address past weaknesses in respect of gender, AFB is planning the first major steering committee for 2001 to coincide with the National Action Committee on the Status of

Women (NACSW) meeting. The 2001 publication will also, for the first time, include a section that focuses specifically on gender-related issues and proposals.

**CHILE** Chile has GRB initiatives in both civil society and government. The inside government initiative is coordinated by SERNAM, the country's gender machinery. SERNAM, together with the budget directorate of the treasury and with the assistance of the Inter-American Development Bank, organised a seminar for public servants on mainstreaming gender in projects and programmes. Gender analysis of the budget is planned for 2001.

UNDP is meanwhile supporting a GRB initiative in municipalities in coordination with the regional subsecretary for development. As in other countries, UNDP's initiative was motivated by the increasing powers given to the sub-national level and the hope that this could provide the basis for democratising the relationship between municipalities and the people who live in them. UNIFEM is providing support to a reference group of experts. The work is based on a previous project in 12 communities that utilised four indicators of gender equality: organisation, exercise of rights, social control and access to decision-making and public voice to defend rights. The current initiative is looking at nine municipalities in four regions of the country. The municipalities were chosen on the basis of size, poverty, rurality and existing initiatives around gender equity.

**EL SALVADOR** Movimiento de Mujeres Melida Amaya Montes, a women's organisation, is working on budget issues in El Salvador.

**MEXICO** In 1999 a group of women NGO leaders and researchers in Mexico City conducted a study of federal programmes and expenditure in the area of reproductive health. They used the Programme of Action of the International Conference on Population Development (ICPD) as a basis. Subsequently, the NGO Equidad de Genero (Gender Equality) held budget workshops that focused on the needs of poor people. Fundar Centre for Analysis and Research, a relatively new policy research NGO established in January 1999, partnered with Equidad to provide the background research

and analysis. By 2000 the two partners had drawn in about 45 women NGO leaders, many of whom wanted to develop similar budget research projects within their own states and municipalities.

Equidad and Fundar have a two-year project plan, funded by the Ford Foundation, to support women leaders in researching and understanding local budgets and using their knowledge in advocacy. The initial phase involves one research team in Mexico City and three teams in states. The project plan provides for a bimonthly email bulletin, two annual public budget workshops and four manuals. The focus will be on both social spending and citizen participation in budgets.

2000 was the first year of the project and was dedicated to research. Advocacy will begin in the later part of the project. During 2000 Fundar was also researching the government's poverty eradication strategy from a gender perspective. In addition, they have started discussions with a government initiative to analyse how public programmes affect women, and hope to work with UNIFEM on building this into the strategy of the government that comes into power in December 2000. The work will include interaction with the statistical bureau.

The National Women's Commission is responsible for a second Mexican initiative, which is located at federal district level. The objective of the programme is to increase awareness among public servants of the administration's responsibilities in respect of inequities resulting from their programming and budgeting processes. While the target is the government, civil society organisations have also participated. As a result of the initiative, the Ministries of Health, Education, Work, Governance, Social Development and Agriculture have signed a convention. A number of programmes and budgets within the different sectors have also been revised.

**PERU** There are two GRB initiatives in Peru. The first is part of a bigger project on 'Budget transparency for better governance' supported by the Ford Foundation. The gender aspect of this project focuses on the Ministry of Women and Human Development, which is the national machinery for women. A university-based team collected information both from the Ministry of Economics and Finance and from the

various institutions that participate in programmes and activities relating to women. Expenditures were classified into different categories: generation of income, literacy, reproductive health and nutrition, gender equality, and institutional development. Other aspects of the overall project focus on environment, youth and defence.

The second project is a pilot being carried out by Centro Flora Tristan with the support of Diakonia and UNIFEM. The project focuses on municipal budgets and is targeted at women councillors in provincial municipalities and districts in urban and rural areas. To date, the initiative has involved 40 municipalities in the coastal, mountain and forest regions of the country.

**ST. KITTS AND NEVIS** St Kitts and Nevis was the second Commonwealth Secretariat pilot in the Caribbean. It was included to explore practical linkages with the previous work by the government on implementing the Commonwealth gender management system (GMS). One result of the intervention was that the Ministry of Community and Social Development and Gender Affairs was able to argue successfully for a six-fold increase in the allocation for the gender unit.

**UNITED STATES OF AMERICA** The United States of America (USA) is one of the few countries in the world not to have ratified the Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW). At the sub-national level, several states, counties and cities have passed resolutions urging ratification. San Francisco has gone further by enacting its own ordinance incorporating CEDAW principles. The city's Commission on the Status of Women was given responsibility for implementation with oversight from an eleven-member CEDAW task force that included elected officials, government employees, organised labour and community advocates.

The first step in implementing the new ordinance was to develop a set of guidelines that would assist in gender analysis of two departments for discrimination in respect of employment practices, budget allocation and provision of direct and indirect services (see <http://www.ci.sf.uf/cosw/cedaw/guidelines.htm>). The Department of Public Works was chosen because of its size, because traditionally it has provided

few jobs for women, and because services are provided indirectly rather than to individuals. The Juvenile Probation Department was the second choice as it provides services to an increasing number of women who are also very diverse. The Commission worked with the international consulting group, Strategic Analysis for Gender Equity, in developing the gender analysis guidelines. It completed its first report during 2000. It is currently looking at four more city departments and also at city-wide practices, such as work-life policies and practices.

In a separate initiative, Jane Midgley has done work on women's budgets in the USA and is currently writing *The Women's Guide to the US Budget*.

## Asia

**BANGLADESH** A new GRB initiative, which will be based in a university, is expected to begin in January 2001. The exercise will be conducted in collaboration with the World Bank and will receive funding from both Norway and the Netherlands. The first phase will involve a beneficiary assessment and incidence analysis, to serve as a baseline study. The second phase, planned for around 2003, will involve work with government on a gender-disaggregated budget.

Related, but less overtly labelled as a GRB exercise, the Policy Research Unit in the Ministry of Health in Bangladesh has been doing pilot work linking gender-disaggregated beneficiary assessment with local service delivery. After exploratory discussions, it was agreed that the pilot would focus on three aspects related to delivery of the Essential Package of Services.

The work is being done in the context of the new sector-wide programmes being introduced in Bangladesh as well as many other developing countries. Barbara Evers of Manchester University has acted as consultant in respect of the health sector. At this stage the outputs and targets are linked to donor appraisal processes rather than directly to government processes. Thus while the country is moving – or being pushed – to output budgeting in respect of the full budget, at present this exercise focuses only on donor supported sector programmes. Evers' reports also point to the human resource,

computer and other constraints on extending the exercise to the different levels responsible for health delivery.

The health work draws on a beneficiary assessment that took the form of a large sentinel survey of public perceptions of government services intended to serve as a baseline. There were, apparently, some questions raised as to why an international organisation was doing this work when there were competent local institutions. A weakness of the assessment in gender terms is that virtually all respondents were women. Comparison of women's and men's preferences and perceptions is thus impossible. A further weakness of beneficiary assessment more generally is that it usually ignores non-users. Evers suggests that gender-aware analysis would be useful in this respect in identifying gaps in the current approaches to service delivery. Evers' report is also useful in its discussion of how each of the Elson tools (see Annex to Elson article) might be applied in a particular sectoral context (Evers, 1997: 5–6).

**INDIA** At the local level, the Centre for Budget and Policy Studies and Karnataka Women's Information and Resource Centre (KWIRC) in Bangalore is planning a separate initiative entitled 'Building budgets from below' that is based on KWIRC's previous participatory district level gender audit. The partners have so far formed an association of elected local women politicians in four districts and consulted with 30 organisations around building a coalition. The project proposal explains that the group will work in the areas of (a) skills for planning utilisation of earmarked funds; (b) understanding the existing budget; and (c) drafting a dream budget. The project will, as a first step, look at how to utilise Danish funds that have been allocated for utilisation by rural village women.

There are also some developments within government. In mid-2000 UNIFEM organised a workshop on GRB analysis that was attended by government officials, researchers and gender activists. Since the workshop, the government has agreed that the Department of Women and Child Development, with UNIFEM support, will prepare an annual chapter for the National Economic Survey. A local institute has been commissioned to prepare the chapter with inputs from key gender analysts.

**THE PHILIPPINES** The Philippines gender and development (GAD) budget, like many others, was inspired by Australia's women's budget. It is probably the most institutionalised initiative after that of Australia. Like Australia's, the initiative is centred inside government and led by the gender machinery in the form of the National Commission on the Role of Filipino Women (NCRFW). But unlike initiatives elsewhere, the GAD budget as introduced in 1996 is very specific as to what is required. It states that every government-related agency must allocate at least five per cent of its budget for gender and development. Proponents were aware of potential criticisms that specifying a percentage as small as five per cent could reinforce women's marginalised access to resources, but proposed a specific amount to avoid vague and immeasurable implementation. The GAD budget was introduced with support from the top, including President Ramos himself.

The GAD budget was seen as a strategic way of ensuring funding for the Philippine Development Plan for Women (PDPW). This Plan should, ideally, have been presented to Congress for approval and allocation of a related budget, but there were fears that Congress was not sufficiently gender-sensitive to give this support. Without the GAD budget, implementation of the Plan would thus have been largely dependent on donor funding. In fact, the first GRB related legislation, Republic Act (RA) 7192 of 1992, specified only that a certain portion of official development assistance was to be spent on women-related programmes and projects. The 1996 measure extended this to all government agencies.

Further developments have subsequently taken place. Since 1998 all agencies have been required to formulate GAD plans and submit these to the ncrfw for approval. NCRFW Management Committee members now sit in on the technical budget hearings conducted by the Department for Budget Management. They also sit in on Congress meetings where agency officials defend their budgets. The GAD budget requirement has also been extended to local government units (LGUs), although there is some controversy as to whether it covers the full budget there or only part of it.

NCRFW monitoring of the GAD budget revealed that in the

early years a large portion of the GAD allocations was spent on women-specific projects responding to practical needs. The second most popular type of allocation was for setting up institutional mechanisms for GAD. The smallest amounts were spent on mainstreaming. Further, while the number of agencies observing the GAD budget requirements has increased over the years, many of the over three hundred national agencies still do not report and even more do not reach the 5 per cent minimum. By 1997 the GAD budgets accounted for less than 1 per cent of total appropriations. The bulk of the amount was accounted for by Health and Agriculture. Finally, some of the allocations are somewhat bizarre, the most notorious relating to ballroom dancing lessons for female officials of the department concerned.

The NCRFW has tried several different ways of assisting agencies to understand what is required, in particular in respect of mainstreaming and ensuring that existing programmes are gender responsive. Some of this work has been funded through CIDA's broader programme of support to the agency. One attempt involved a question-and-answer booklet. The booklet takes a fairly gentle line. It states: 'While activities such as ballroom dancing and livelihood skills training for the agencies' or LGUs' women workers may benefit women, they may not respond to the priority gender issues being addressed by the agencies or LGUs.' A more recent directive that takes a harder line in stipulating unacceptable allocations has reportedly met with some resistance.

Within the NCRFW there is a recognition that the 5 per cent itself is not all that important. The important thing is that the agency should have a GAD plan and see the GAD budget as the means to implement the plan rather than as an end in itself. Ultimately, when the agency's entire operations and budget are gender responsive, they can claim that their GAD budget is 100 per cent.

The NCRFW provides technical assistance to agencies in devising their GAD plans and budgets. It is a larger and stronger organisation than the gender machinery in many other countries. Nevertheless, it is far from large enough to service all the hundreds of central agencies, let alone the LGUs.



In at least some LGUs, women councillors have latched onto the idea and pushed for their own area-specific GRB ordinances. But there are many others where little has happened.

As noted above, the GAD budget is primarily a within-government exercise, although the NCRFW has called on civil society partners for assistance, for example with evaluation. A more recent exercise, initiated by the Asia Foundation, focuses more on civil society. It also focuses on the local level. During the preparatory phase, this exercise was discussed with the NCRFW, who were supportive for a number of reasons. Firstly, by focusing on the local level, the new exercise will provide support where the NCRFW has limited ability to reach. Secondly, the Asia Foundation exercise introduces ideas from GRB exercises elsewhere in the world. It asks what happens to the other 95 per cent of the budget and argues that, until one understand the answer to this, it will be difficult to plan to use the 5 per cent GAD budget effectively. This approach ties in well with the NCRFW's understanding of what the GAD budget is about.

In the first phase the Asia Foundation exercise involved action research in three local governments, plus a background paper discussing the context for gender responsive budgets at local level. Two of the pilot LGUs are ones in which there is a strong woman councillor, based in a local NGO, who has already been active in pushing gender issues. The partner in the third LGU is a people's organisation that has done participatory training around budgets for local officials and citizens. One key aspect of the next phase of the Asia Foundation project will be capacity building around advocacy on the basis of the research findings.

The regional UNIFEM office hopes to work on a parallel initiative with the NCRFW, Department of Budget Management and National Economic Development Authority to investigate possibilities of institutionalising a GRB initiative approach that moves beyond the 5 per cent GAD budget. An initial one-day seminar during June 2000 introduced the '95 per cent' approach to NCRFW and other officials.

**SRI LANKA** Sri Lanka was the second Commonwealth Secretariat pilot. The choice was useful in illustrating the

benefits of a social services-friendly government policy for poorer women and men even where gender is not an explicit aim at the outset. It was agreed that the Ministry of Finance would be the lead agency. The Ministry of Women's Affairs was happy with this position given the resource constraints of their ministry.

Training of government officials took place during April 1998. Participants consisted of a team of officials from Education, Health, Agriculture and Lands, Social Services and Industrial Development. The initiative as a whole was coordinated by the Budget Department of the Ministry of Finance under the leadership of a committed gender activist and economist.

For the Commonwealth team, Sri Lanka served as the testing ground for the approach that was later formalised in the Commonwealth manual. The process included a preliminary mission and capacity building workshop, supported by follow-up visits by the Commonwealth Secretariat. A consultant coordinated the activities of the teams working on the gender analysis of the agriculture, education, health, industry and social services sectors. The final report, prepared by the Department of National Planning, includes special surveys to obtain gender-disaggregated data on service delivery. It focuses on recurrent spending in 1996 but also examines later budgets to a more limited extent. The report also looks at public service employment.

One immediate concrete output of the Commonwealth initiative was specific reference to women's contribution to the economy in the 1999 Budget Speech. Another was the development of a long list of indicators. There was some discussion about introducing the GRB analytical tools into the curriculum of the Sri Lanka Institute of Development and Administration and of introducing gender analysis into appraisal for the Public Investment Programme.

**THAILAND** The World Bank has initiated a small project in Thailand involving gender analysis of the wid budget within two agencies.

**VIETNAM** The 1999/2000 Vietnamese public expenditure review coordinated by the World Bank, bilateral donors and the

government explicitly gave some attention to gender issues. The Netherlands Embassy played a key role in ensuring that this was done and providing support for the innovation. During the exercise there were ongoing tensions as to what mainstreaming of gender into a PER should entail. The Bank interpreted it as largely confined to the impact of expenditure, particularly in the social sectors. Others argued for a broader analysis that included examination of imbalances at the institutional level. During the research stage there were problems when the 'non-gender' specialists had difficulty in understanding how to incorporate gender into their analysis. Despite these difficulties, the initiative should bring some concrete results as the Bank and Ministry of Finance have agreed on a timetable for implementation of some of the recommendations, including some gender-related ones.

## Europe

**AUSTRIA** Gabriele Michalitsch of the Institut für Volkswirtschaftstheorie und -politik has written articles and conducted lectures and workshops on gender bias in Austria's financial policies, including the national budget. Her work focuses on changes in policy since the take-over of the new government in February 2000.

**FRANCE** The French government produces a gender impact statement that it issues together with the budget.

**GERMANY** A small group within Frauenforum, an NGO which is (or was) a member of Women in Development Europe (wide), has been working on gender responsive budgets. A GRB working group of women, mainly from Berlin, was formed in October 2000.

**IRELAND** Gender impact assessment is incorporated in the implementation of the National Development Plan, which is a multi-year expenditure plan for the period starting in 2000. The government has drawn up gender impact assessment guidelines to guide the exercise.

**ITALY** In September 2000, the Equal Opportunity Commission of Italy sponsored an international workshop on gender

auditing of government budgets. The main sessions focused on experiences in Australia, the United Kingdom, the European Union and three African countries (South Africa, Tanzania and Uganda). The event included a round-table debate with the participation of Italian government authorities and consultants in charge of drafting or analysing budgets at local and national level. It was intended primarily as an opportunity for information-sharing.

**NORWAY** In Norway the Ministry of Children and Family Welfare has done some gender analysis of the budget.

**RUSSIA** The Open Society Institute is supporting a GRB initiative.

**SCOTLAND** After nearly a decade of publishing an annual report on the position of women in Scottish life, the information research and networking organisation, Engender, was invited to a meeting with the Minister of Finance to discuss the relationship between policy and budget. In late 2000, the government agreed to employ someone within the Finance Department to advise government on how to initiate gender impact analysis. Government also agreed to establish a gender advisory group with representation from Engender, other NGOs, the Equal Opportunity Commission, civil servants and politicians.

**SPAIN** The government of the Basque Country has shown interest in introducing a gender sensitive budget approach. In 2000 there were two initiatives which moved the process forward. The Basque Country's women's office, Emakunde, in partnership with an education information technology company, Infopolis, established a virtual library of materials on gender responsive budgets. These materials are available on the web ([www.infopolis.es/usuarios/bibliotec.htm](http://www.infopolis.es/usuarios/bibliotec.htm)). In addition, Rhonda Sharp was invited to provide a briefing on gender responsive budgets to the President of the Basque Country, his Finance Minister and senior government officials.

**SWITZERLAND** In March 1994 the trade union of public employees commissioned a study on the direct and indirect impact of cutting the budget deficit on women. The study, published in both full and more popular form (Bauer and Baumann, 1996), was undertaken by a social and labour studies

unit and co-financed and co-edited by the trade union and the Swiss Conference of Equal Opportunity Officers (EOO).

The study analysed three issues in respect of public funding:

- ◆ Effects on employment of women and men both in the public sector and beyond;
- ◆ Effects on women and men as beneficiaries of state services; and
- ◆ Effects on non-paid work of women.

The study was disseminated through meeting at cantonal and communal level, within parties and trade unions and at EOO meetings. Since the first study, there has been a range of national, cantonal and communal level initiatives started by women's groups, EOOs, MPs and trade unionists. Basle is most advanced, and the parliament there has instructed the government to take forward the analysis. Motions similar to the Basle one as well as other initiatives exist in Zurich, Aargau and St Gallen.

The Swiss gender responsive budgets are strongest where there is support from progressive political parties and parliamentarians, collaboration with and lobbying by women's organisations, and strong EOOs. The church, and women's groups within the church, have also become advocates of GRB analysis.

One of the problems for Swiss activists in this arena is that the system of budgeting differs between the levels. This has made it more difficult to take the experimental work done at national level to the sub-national level. A second challenge is the shift to New Public Management. This shift will change the way budgets are made and drastically reduce the unusually high level of budgetary decision-making power which public representatives and even the general public enjoy in Switzerland. A third problem is the time lag in statistics, which leads to arguments that the research is of no use for policy- or budget-making.

**UNITED KINGDOM** The key player in the United Kingdom is the extra-governmental Women's Budget Group. This is a loose and small, but impressive, group of gender activists from different sectors. The Group has managed to raise a limited amount of funding, but nothing like the scale of some of the

developing country initiatives, and certainly not enough to employ full-time staff.

The Group's potential increased dramatically when the Labour Party was elected in the mid-1990s. This was a result both of personal contacts with those in power and because the new government was more open to addressing disadvantage. It is also more open to consultations, to the extent that it now produces a pre-budget consultation paper in November each year that outlines the main policies and proposed changes. This innovation has allowed the Budget Group and others to make formal submissions that should, theoretically, have more chance of influence (Himmelweit, 2000).

In November 1998 the Treasury and the Women's Budget Group co-hosted a one-day workshop which included inputs on the Canadian, Norwegian and South African experiences of gender-related budget, policy and time use work. Since then, besides submissions at critical points, the Group has had regular meetings with the Treasury.

There is some scepticism within the Group as to whether these meetings really influence the thinking of the Treasury or are rather an opportunity for the Treasury to use them as sounding boards. Yet the Treasury publications, including those issued on budget day, suggest that it is aware of some of the issues, even if not at some of the more profound levels put forward by the Group. For example, Treasury paper 9 of 1998 on 'Women and the Budget' quotes the Chancellor as acknowledging that women predominate in 'workless households, low earners, part-timers, and people with caring responsibilities', all of which 'have often been ignored' (Her Majesty's Treasury, 1998).

The Women's Budget Group's own publications attempt to go deeper in questioning the economic framework implicit in the approach of the Treasury (and general society). So, for example, there is a lot of emphasis on the care economy and on time. The Group's writing, while acknowledging that the government has a stated commitment to poverty eradication, particularly among children and their carers, questions whether this commitment will be honoured if and when it comes into conflict with other policy objectives, such as 'keeping British industry competitive' (Himmelweit, 2000).

The Group focuses on efficiency arguments for gender responsiveness. It argues that these arguments fit well with the Treasury's concern with 'value for money'. It argues, too, that the efficiency argument constitutes a more radical approach than 'fairness' if it is based on an understanding that the concept of 'efficiency' in economic theory needs to be redefined (Himmelweit, 2000).

Unlike many other GRB exercises, the UK one focuses more on taxes and benefits than expenditure. This partly reflects the nature of budgets in the country, in that budget day itself focuses on taxes rather than on spending. Spending is announced later in the year, with very little publicity and public interest. The focus on taxes and benefits also reflects the fact that these affect a far larger proportion of the British population than they do in developing countries.

## The Middle East

**ISRAEL** The Adva Center in Israel conducts analysis of budgets from various angles. It does not have a specific project on gender or women. However, in 1997 the Centre produced an analysis that looked at what the recently released budget meant for women as consumers and as workers. Using this basic framework, the document moves systematically through topics that include health, education child allowances, old age pension, unemployment compensation, labour and social affairs.

**LEBANON** The regional office of UNIFEM in Beirut recently organised a one-day workshop for UN gender focal points on gender responsive budgeting and auditing.

## The Pacific

**AUSTRALIA** The Australian women's budgets are the longest surviving in the world and were the inspiration for several of the current initiatives. The first Australian women's budget was established in the mid-1980s shortly after the Labour Party came into power. At one stage there were women's budgets at federal level and in each of the territories and states. There are a number of thoughtful assessments of the strengths and

weaknesses of the initiatives that are more critical than self-assessments by some other countries, but are useful as pointers to possible weaknesses elsewhere. The following profile draws out only a few of these points.

The Australian women's budgets were situated inside government. They were coordinated by the women's machinery (which would today be called gender machinery or gender management system), but required significant work to be done by all other ministries. The role played by 'femocrats' (feminist bureaucrats) in taking the initiatives forward had both advantages and disadvantages. On the plus side, it was their hard work and commitment that ensured that the work was done and the frameworks developed. On the negative side, their capable management of the process weakened participation by women in civil society. As a result, there were very few complaints when the Women's Budgets were allowed to wither away.

In their heyday, the Australian women's budget statements were thick documents. The Commonwealth (national) document, for example, averaged 300 pages. To attract a wider readership among women's groups, the Commonwealth statement was, however, also issued in a shorter, illustrated format. In most cases the women's documents were released on budget day as official budget documents. Victoria decided to issue their document separately so that it would not be 'lost' among all the other budget information, and so that the Women's Policy Co-ordination Unit, rather than the Office of Management and Budget, could retain more control over the contents (Sawer, 1996: 13).

The documents were thick because they included a comprehensive statement from each ministry and department as to the implications of their expenditure (and sometimes revenue) for women and men. The statements were prepared according to standardised formats that were drawn on in devising the approach suggested in the Commonwealth/AusAID manual (Budlender and Sharp, 1998). Standardised formats are the preferred approach for bureaucratic work, and also ensured that sector officials knew what questions to ask. However, the sheer bulk of the resulting document, and the comprehensive (but boring) standardised format, meant that the reader had to



be committed to find all the really useful information they contained. The reader also had to be critical, as few sector officials were likely to criticise their own policies outright, even if they recognised the weaknesses themselves, which many did not. In general the women's machinery officials let the reports stand as prepared by sector officials, 'allowing departments to damn themselves with their own words!' (Sharp and Broomhill, 1990: 6).

A related point is that the documents spoke about what was there in terms of policy and budgets, but did not speak about what had been cut. So, for example, there was no record in the national (Commonwealth) government document of the 1986/87 cuts to the budget of the Human Rights Commission that is the arbitrator for the Commonwealth Sex Discrimination Act (Sharp and Broomhill, 1990: 4).

The women's budget statements have been criticised for being only a reporting or accountability mechanism and thus having no impact on policy. This is perhaps too harsh as it is possible that officials, in compiling the statements, became aware of weaknesses, which they later attempted to correct. There were, however, also more explicit attempts to get gender integrated in policy. For example, in New South Wales the Women's Coordination Unit was given a formal role in the budgetary process that spanned several months of each year. However, Sawyer sees even this as being more about finding new initiatives for women than about detailed examination of the gendered effect of all programmes (1996: 14).

In the late 1980s Australia started moving towards programme budgeting. Some femocrats saw this as providing new opportunities for monitoring gender responsiveness. However, by the mid-1990s gender reporting had still not been included among the formal requirements laid down by the Estimates Committee.

With the change in government in the mid-1990s, there was less interest within government to continue the initiatives and some of them were abandoned. The government's diminished gender responsiveness, however, was only one of the reasons for their abandonment. New South Wales, for example, argued that the approach placed too much emphasis on funding and

therefore decided to move from gender responsive budgeting to gender auditing. In New South Wales and elsewhere, there was a perception that the returns from the Australian exercises did not warrant the enormous amount of work. This was particularly so given that budgets generally change relatively little from year to year in a stable country situation.

By 1997, only four states' governments still had women's budget exercises. Soon afterwards this dropped to two. One of the factors which protected the two surviving exercises was the presence of stable gender machineries and long-serving top staff (Sharp, 2000). In 2000, however, Tasmania stopped publishing their women's budget statement pending a major review of output budgeting, leaving only the Northern Territory. Unfortunately, the Territory's report is limited, reporting mainly on activities by the Women's Policy Office rather than mainstreamed activities.

More hopefully, with the elections approaching – and perhaps inspired by developments in other countries – the South Australian government is considering re-introducing a women's budget. Even at this stage there is evidence that the previous women's budget statements have left their mark. Thus the seven-page Appendix A of South Australia's Budget Statement for 2000/1 described the impact of the budget on families, while the nine-page Appendix B described the impact on women.

**FIJI** Fiji was the Pacific pilot for the Commonwealth's Secretariat's programme. Commonwealth support for the Fiji initiative was subsequently postponed following Fiji's suspension from the Councils of the Commonwealth. There is, however, interest on the part of Fiji civil society organisations. In July 2000 the National Council of Women Fiji issued a statement on the mini budget, which bemoaned the lack of gender specific affirmative action as well as the lack of recognition of the need for peace and national reconciliation. Civil society organisations have also made contact with general budget initiatives in other countries.