

## TOPIC: Gender and macroeconomics: national budgets

**Conceptual rating:** [BASIC to INTERMEDIATE level](#)

**Suggested module objectives:**

- 1) Introduce participants to a practical, effective tool to advance gender equality nationally (gender-based budgeting).
- 2) Illustrate how gendered macroeconomic analysis can be applied in a specific policy setting.

**Key concepts:**

- 1) gender budgeting, also known as gender-responsive budgeting, gender-based budgeting – definition, rationale, methodology, impact

**Cross references:**

- **Link with Module 10:** Gender and fiscal policy, with a focus on taxation.

**Time required:** 75-90 minutes

**Suggested methodology:** BRAINSTORM. Mini LECTURE. VIDEO.

**Relevant readings:**

- Budlender, Debbie, “Gender Budgets: What’s in it for NGO’s?” *Gender and Development*, Vol 10, No. 3, November 2002.
- Budlender, Debbie, “Expectations versus Realities in Gender-responsive Budget Initiatives”. UNRISD, 2006.
- Economic Commission for Africa, “A Conceptual and Analytical Framework for Gender Mainstreaming in National Accounts and National Budget: Words Need Numbers to Influence Them”, African Centre for Gender and Development, Ethiopia, 2002.
- Stotsky, Janet Gale, “Budgeting with Women in Mind. Why Using the Budget to Empower Women Makes Good Economic Sense.” *Finance and Development*, Vol. 44, No. 2.
- Stotsky, Janet Gale, “How Tax Systems Treat Men and Women Differently”, *Finance and Development*, March 1997.

- UNIFEM, “Gender Responsible Budgeting: Concepts and Principles” A PowerPoint Presentation of the UNIFEM GRB Initiative AND Brochure, 2006.
- Zuckerman, Elaine, “An Introduction to Gender Budget Initiatives”, Gender Action, 2005.
- Elson, Diane, “Monitoring Government Budgets for Compliance with CEDAW. Report Highlights and Key Conclusions”. UNIFEM, 2005.
- UNIFEM, “Gender Equality for Development Effectiveness: National Development Planning in the Commonwealth of Independent States”, UNIFEM discussion paper, January 2008.
- Foster, Mick and Fozzard, Adrian, “Aid and Public Expenditure: A Guide”, Centre for Aid and Public Expenditure, Overseas Development Institute, October 2000, London.

**Preparation and supplies needed:**

- Newsprint pad/flip chart paper and markers to record certain parts of the discussion.
- Film, video, DVD player with projector or TV, as needed.
- Review suggested reading material.
- Check [www.if-watch.net.org](http://www.if-watch.net.org) and other sites for films that depict the impact of structural adjustment policies, preferably with a gender analysis. Choose one related to your country or region, and preview. Find an appropriate short segment to show, no more than 5-7 minutes long. Some examples of possible films: “Profits of Doom”, “Life and Debt”, “Deadly Embrace”, “To Be A Woman”. OR check with UNIFEM for a short video on gender budgeting.
- Investigate whether there is work being done in your country and/or region related to gender responsive budgeting. If so, learn about its extent and impact and who is involved.
- If there have been significant examples of privatization of state-owned enterprises in your country, investigate whether you can get any data or analyses that examines the gendered consequences for such things as employment, alternative provision of the same services, impact on health, education, well-being of males and females, etc.
- If you are not familiar with the budget-making process in your country, learn about the basic steps and where effective intervention points are. The Foster and Fozzard paper has an excellent schematic illustrating a typical budget cycle on page 14. See pages 14-18 of that same paper for a generic review of the budget process.

### **Suggested content to be covered:**

- Why government budgets are an important terrain of work for advancing equality and addressing poverty.
- Definition of gender-responsive budgeting (and synonymous terms)
- Misimpressions of gender-responsive budgeting – what it is not (e.g. requires separate budgets for males and females; analyzes males and females in government service; requires a 50:50 budget allocation for males and females; only looks at social differences by sex in the analysis.)
- Benefits of this approach (e.g. more efficient, effective government spending; promotes accountability and transparency; helps to minimize corruption; powerful tool to address inequalities in society; can stimulate greater civic participation, promote grassroots democracy)
- How gender responsive budgeting is done. (Note to facilitator: Budlender outlines 5 steps for NGOs; UNIFEM has 7 steps, including a macroeconomic policy analysis. You will need to determine what makes sense for your audience in terms of level of detail and complexity.)
- Examples of particular initiatives and their impact.

### **Description of how to conduct the session:**

1. Welcome by host group(s) and introduction of facilitator(s); provide any needed logistical information; outline goals for session. If this follows previous economic literacy modules, briefly remind participants of the major points covered in those and how those points connect with the goals for this session.
2. Depending on size of group, invite participants to introduce themselves, share an expectation or question they bring. (Record expectations or questions on newsprint, if you are doing this step, and refer to them throughout the session.)
3. **BRAINSTORM.** Ask the group to call out what they know or what they think gender responsive budgeting means. Record their answers on newsprint. Do this briefly – for 2-4 minutes.
4. **Mini Lecture:** Use the group's answers to engage in a short definition and discussion of what it is and isn't. (Be sure to address any misconceptions that arose in the brainstorm.) Keep this brief – no more than 5-7 minutes.
5. **BRAINSTORM.** Invite the group to call out ideas for why gender based budgeting might be an important tool for advancing equality and addressing poverty, particularly the poverty of women and girls, and what the benefits generally might be of a government doing gender responsive budgeting. Write the list of points for the rationale on newsprint for everyone to note. (5-10 minutes)

6. **FILM/VIDEO.** Show a short clip that drives home the point of how/why gender activists need to be involved in discussions around budget priorities and policy. 5-7 minutes
7. **Large group DISCUSSION.** Briefly process with the group what they saw in the video and what this means for offering a rationale for gender based budgets.
8. **Mini LECTURE.** The facilitator or a resource person outlines the steps of a gender responsive budget analysis. 15 minutes. Then, invite questions and discussion with the audience.
9. Close the session by offering examples of where gender budgeting is being done and its impact. The amount of detail will depend on how much time you have for the session.
10. Wrap up with three points: a) gender budgeting can be an effective tool for change – more than 50 nations now engage in some form of it; b) this is an initiative where NGOs have an important role to play in making such efforts happen and keeping government officials accountable once it is under way; c) there are financial and technical resources available to support this work by civil society and for government officials.
11. If this is part of a larger economic literacy effort, link this session to the next one. Provide logistical details related to the next session, as appropriate. Thank the audience for their participation.

**Ideas for alternative methodologies/modification of the level of discussion:**

- **For an intermediate to advanced group or advocacy-based audience,** add: Identify the opportunities and limitations of gendered budget analysis for countries engaged with international financial institutions. Discuss the Poverty Reduction Strategy Paper process. The UNIFEM 2006 document on GRB and reproductive health, pages 42-43 in the English version, will provide some insights on this if you are not familiar with PRSPs. If time and interest exists, at least mention problems like inflation-targeting as agreed to with the IMF and what that does to particular sector budgets. If you acquire the text of a PRSP for your or another country, the discussion could be enriched by engaging in small groups dissecting it as a **CASE STUDY**.
- **For an intermediate to advanced audience:** Spend time looking at how unpaid work is defined and measured as well as what is being done in this regard in your country. Analyze how unpaid work is a key factor in gender budget initiatives. If helpful, look at the work plan related to this for sub-Saharan Africa as outlined in the ECA paper. **OR** take a particular sector, and go into detail about what would be involved in a gender responsive budget analysis. **OR** into greater depth about how budgets are financed and the gendered implications of various options.
- **For a more activist audience, or one with a particular sectoral interest:** Instead or in addition to offering examples of what is being done generally

with respect to gender based budgeting, do a specific **CASE STUDY** of how it would be done for a specific sector. The UNIFEM material could be used for a case study in health, for example. Two permutations of this idea: a) consider a case study in a sector where there has been significant privatization; and b) contrast one sector where there has not been privatization with one that has been significantly privatized. What are the consequences for gender responsive budgeting?

**VISUAL MAPPING.** With the large group, draw a map of the steps involved in the budget process in your country. (The illustration on page 14 of the Foster and Fozzard paper may be helpful background.) Identify who the key actors are at each step, and what gets done at that point. Once all the steps are mapped, discuss where possible intervention points might be to introduce or strengthen gender budgeting in your country. Depending on how much time is available, some of the discussions about intervention points could be done in small groups.

- **For government officials or NGOs seriously interested in advancing gender budgeting in country:** consider contacting the nearest UNIFEM or Commonwealth Secretariat (CS) office and ask for a briefing. UNIFEM, the CS and the International Development Research Centre offer technical assistance to governments and civil society on this tool.

#### **Some useful organizations or websites related to this topic:**

- [www.gender-budgets.org](http://www.gender-budgets.org) UNIFEM has an active, effective technical assistance program for Southern government officials to introduce gender budgeting initiatives in collaboration with the Commonwealth Secretariat and the Canada's International Development Research Centre. This site has materials in English, French, Spanish, Portuguese and Arabic. In addition to a wealth of technical information, and examples of applications, there is an excellent, extensive annotated list of links.
- [www.tgnp.org.za](http://www.tgnp.org.za) This is the website of the Tanzania Gender Networking Programme, an NGO with a focus on gender budgeting.
- [www.internationalbudget.org](http://www.internationalbudget.org) The Center on Budget and Policy Priorities has a special unit, the International Budget Project, which specializes in providing training and technical assistance to civil society groups around the world on how to read and analyze budgets and how to hold officials accountable by tracking where expenditures really go. They produce a newsletter and various written tools. Some materials available in multiple languages.
- [www.dawnnet.org](http://www.dawnnet.org) This is the website for a global network of Southern feminist female researchers, academics and activists. Check out their analysis related to national budgets under the research theme of "Political Restructuring and Social Transformation".

- [www.genderandmacro.org](http://www.genderandmacro.org). In addition to their own publications and research findings, they have an excellent list of other links.
- [www.odi.org.uk](http://www.odi.org.uk). An excellent site for relevant publications related to aid, budgets, and other development issues.
- [www.umass.edu/peri](http://www.umass.edu/peri) This is an academic research website, but the research findings are put into a larger political context generally related to the perspective of developing nations.
- [www.unrisd.org](http://www.unrisd.org)-- UN Research Institute for Social Development. A great resource of academic research, applying gender analysis to various topics.
- [www.cepr.net](http://www.cepr.net). For articles and lectures (some in Spanish; primarily in English), on macroeconomic, international, trade and other relevant topics from a basic to more detailed and sophisticated analysis, select the “issues” tab.