

A LEARNING PROGRAMME IN ACTION:
UNIFEM Gender Responsive Budgeting Programme
Mid-term Review Summary Report

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The views expressed in this publication are those of the authors, Simel Esim and Virginia Vargas, and do not necessarily represent the views of UNIFEM, the United Nations or any of its affiliated organizations. This summary is based on a longer report that was produced for use by UNIFEM GRB programme staff and partners.

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EXECUTIVE SUMMARY

The United Nations Development Fund for Women (UNIFEM) commissioned a mid-term review of the Gender Responsive Budgets (GRB) programme supported by the Government of Belgium. The purpose of the mid-term review was to examine progress to date, assess the effectiveness of tools and capacity building strategies in use, and align programme activities with expected results. At the time of the mid-term review in August 2003, 20 countries had ongoing initiatives on gender budgets under the Programme. These are: India, Nepal, Brazil, Chile, Kenya, Peru, Ecuador, Bolivia, the Philippines, Nigeria, Tanzania, Uganda, Sri Lanka, Guatemala, Morocco, Egypt, Mexico, Belize, Senegal and Mozambique.

The review found that the Programme is comprehensive and innovative with multiple components (research, capacity building, policy advocacy, knowledge network, etc.), unique strategies, approaches and tools. The first phase of the programme has established a strong infrastructure with strong partnerships, and clearly identified objectives and activities. The actual outputs are slowly emerging although more will come to fruition in the second phase along with actual impact/outcomes.

Certain regions or countries are stronger in some of the programme areas than others. For example, LAC region is leading with its innovations in the area of tool development. The Andean Region gender budget initiatives are emerging with strong local level budgetary analysis and participatory exercises. East Africa has spearheaded a knowledge network that is strong in policy advocacy and training and awareness raising aspects of gender budgeting among policy makers, NGOs and researchers. South Asia and Central America regions have strong research and capacity building tools. In a number of regions including the Arab States, South East Asia and West Africa cooperation with donor agencies, especially engaging with the World Bank on PRSPs, Medium-Term Economic Frameworks (MTEF), performance based budgeting and economic management capacity building exercises is a strategy of choice.

The GRB Programme has played important and strategic roles with civil society organizations, and budget actors. Partners particularly valued UNIFEM's role in:

- ?? Convening and bringing the different budget actors together at the regional, national or local levels (e.g. Southern Africa region).
- ?? Providing technical assistance and building the capacity of the partners and policy makers, providing a set of trainings utilizing international gender budget researchers and analysts (e.g. Ecuador, India, Morocco, etc.).
- ?? Being a catalyst for partners in launching a gender budget programme and leveraging funds and support from other donors for the programme (e.g. in Brazil with DFID, in Morocco with World Bank)
- ?? Contributing as one of many donors supporting budget work in countries and regions where this work has already been going on (e.g. Tanzania, Uganda, Mexico)
- ?? Leading in working closely with country partners in drawing a road map for pro-poor gender budget analysis (e.g. Nigeria, Sri Lanka, Nepal, Senegal, Egypt)
- ?? Enabling and innovating when it comes to ideas that other donors or international agencies do not see the value in contributing to (e.g. engendering macroeconomic modeling in Tanzania, looking into HIV/AIDS, gender and resources in Mexico, etc.)

More specifically, the analysis pointed to the following key findings:

Innovative strategies are emerging from a number of pilots on developing research and capacity building tools, coalition building, identification of sectors/issues in the first phase of the GRB Programme.



Programme partners noted gaps in the gender budget analysis tools and methodologies that existed at the start of the programme. Therefore the programme has enabled them to develop their own tools and methodologies for gender analysis of budgets building on existing tools. These tools include: Mapping of budget process; Differentiation of local budget analysis from national budget analysis; Methodology for gender budget analysis of multi-sectoral issues such as domestic violence; Gender budget analysis integrated into the stages of the budget process; Gender budget analysis methods building on pro-poor and participatory budgeting; Developing indicators to enable monitoring of relevant data; Beginning to apply gender budgets as a monitoring tool for MDGs, PRSPs, and CEDAW among others; Exploring links between MTEF, performance budgeting and gender budgeting; and Developing the building blocks of gender revenue analysis.

Effective use of research findings in advocacy is taking place to varied extents. Policy advocacy is successful in LAC and East Africa, whereas in South Asia and Anglophone West Africa few clear results can yet be reported. The strategies from LAC would be important learning for the other regions. While West Africa is emerging with sound research, the advocacy connection is not engrained in the initiative.

Global studies commissioned by the Programme have played an important role in bridging the emerging lessons from the pilots with key policy issues CEDAW, MTEF, performance budgeting, revenues, etc. There is a need for more consolidated papers of such reflective nature building on the learning from the Programme experiences on the ground. These papers also bring expanded visibility to the learning and the added value of the Programme.

Gender implications of revenue policies are emerging as an area of interest for women's groups, researchers. While most of the existing work on gender implications of tax policies is focused on income taxes in OECD countries, some research around value added taxes and user fees have also been conducted in developing countries. Increasingly, the GRB Programme country initiatives also are tackling taxation policies but still not enough attention is paid.

Recommendations:

Findings indicate that a "second phase" to the GRB Programme is a *sine qua non* in order to organize, crystallize, and consolidate the experiences from the first phase. In addition, a next phase can provide the opportunity to go further in areas of promise emerging from the first phase to establish stronger examples of good practices and success. The evaluation findings suggest that the following areas need to be targeted more intensely and for which resources will need to be mobilized.

Strengthened partnerships for sustained initiatives: UNIFEM's contribution to the GRB process has been to open spaces of greater effectiveness and partnership between civil society and the state. Nevertheless, opening spaces is only the beginning of a complex and elusive process, because what is achieved in a moment can vanish due to a change in authorities or government. One way of achieving sustainability of the initiatives is to ensure ownership of the initiative by partners from an early stage. UNIFEM and its partners can benefit also from building alliances with pro-poor and participatory budget groups. These groups work in their own informal decentralized networks regionally and globally. They have also developed tools and experiences that can bring a unique contribution to the work on applied gender budget analysis and advocacy. Such alliances would have the added value of: mainstreaming gender in pro-poor budget analysis; building joint strategies around engaging/influencing the PRSP process; learning from each other's successful strategies, tools and techniques for research/analysis as well as training/capacity building and dissemination and advocacy.

Diversifying levels of advocacy for policy change: There is more room to develop the engagement of GRB pilots in the various stages of the budget process. So far the analysis with partners has mostly been ex-post facto, taking place somewhere between the auditing and budget formulation



phases of the cycle. This analysis can and does feed into policy design and budget drafting phases. Yet it is important to engage with the budget actors during the budget formulation, as well as the enactment and execution stages. More engagement in the budget formulation stage requires closer work with Central Ministries (Ministry of Finance, Planning) and sectoral ministries' budget and planning departments. The gender budget groups need to provide assistance to these ministries in terms of specific guidelines, checklists, and analysis tips towards integrating gender into budget drafting/planning stages.

Connecting the initiatives regionally: While most of the resources in the first phase of the GRB Programme went to country level work, for the future there is value in allocating more resources for strengthening exchange and collaborative work at the regional level. Linking the country level initiatives regionally will ensure transfer of learning, sharing of resources and expertise and collaborative setting of a regional agenda and target for advocacy. Therefore, the country level initiatives should be reviewed to explicitly include a regional focus to them supporting the emerging regional networks on gender budgets.

Documenting and sharing innovation for learning and visibility of the issue: Programme partners have come up with tools and methods that are innovative in moving the field of gender budgeting work forward. The extensive approaches such as working at the local level, working with parliamentarians, or on multi-sectoral issues present very unique lessons and require thorough documentation and dissemination. The consolidation of these innovations in a systematic manner for use by wider audiences will result in the much needed paradigm shift in the gender budgeting field. For the initiatives to be sustainable through support by other donors, stakeholders and budget actors, they also need to have increased visibility. The consolidation of the materials, including the standardization of various training tools and materials developed, will also help toward increasing the visibility of the programme with the external world, as well as increase learning and exposure between different programme pilots and activities. The recently updated Gender Budgets Initiative website built in collaboration with IDRC and the Commonwealth Secretariat would be an ideal space to showcase the tools, materials and experiences.

Supporting capacity building and training for specialized gender budget analysis: The first phase of the programme has been successful in creating a national constituency that has a general understanding of what gender budgeting is and can engage in budget research, training and advocacy. This along with the investment of the program of capacity building on gender and economics literacy in Latin America and West Africa has contributed to expanding the pool of practitioners who can engage in gender budget analysis. The second phase needs to invest further in building capacity and standardized tools for more specialized application of gender budget analysis at different levels (national, local), in different sectors, as well as for different target groups (national, local, parliament, fiscal policy makers, budget actors, women activists, sector specialists).

Next Steps

Some concrete next steps for the UNIFEM GRB Programme second phase activities include the following.

Establishing National Advisory Groups: The pilots would benefit from forming a national advisory groups that include key budget stakeholders (Ministry of Finance, National Planning Commission, National Statistics Office, Budget Analysts/Researchers, Ministry of Women's Affairs, Budget Advocacy Groups/NGOs, and Women's NGOs, etc. as members). The role of the Groups would be to guide the initiatives to ensure national ownership, synergy with key budget and policy-making initiatives, and sustainability.

Supporting issue based initiatives: Gender budget tools are being tested in multiplicity of areas including HIV/AIDS, unpaid care work, access to services and resources, sex disaggregated impact of revenue raising measures, gender budgeting in post-conflict settings and violence against women.



Many of these require multi-sectoral tools and specialized methodologies for analysis (e.g. domestic violence), and carry time sensitive urgent response requirements (e.g. HIV/AIDS, post-conflict).

Consolidating and sharing learning: Several steps will be taken to systematically document and share learnings emerging from the Programme so far. In the early stages of the second phase, at least four synthesis papers will be prepared on lessons learned and good practices from the first phase of the programme. These will be made available in multiple languages. A workshop of GRB Programme staff and partner agencies will also be organized for cross-regional learning and to strengthen networking between the various initiatives supported by the programme. This face-to-face networking and sharing will be re-enforced by the internal electronic community of practice that was established in mid-2003. The knowledge and learning emerging from the programme will also be shared through the revamped interactive gender budgets website.



ACRONYMS

ADB	Asian Development Bank
AfDB	African Development Bank
AMB	Brazilian Women's Articulation
AMN	Black Women's Articulation
AWID	Association for Women's Rights in Development
CBA	Center for Budgetary Accountability-Indian NGO
CDD	Center for Democracy and Development-Nigeria
CEDAW	Convention for the Elimination of Discrimination Against Women
CEDLA	Centre of Studies for Latin American Development -Bolivia
CENSIDA	National Center for AIDS
CEPAL	Economic Commission for Latin America, Central America and the Caribbean
CIES	Centre of Economic and Social research - Bolivia
Criola	Black Brazilian Women's Organization
CPPC	Center for Public Private Cooperation-Nigeria
CUAVES	Urban Self Managed Community of Villa El Salvador
CUT	Central Workers' Union- Brazil
DFID	Department for International Development, bilateral donor, UK
DESCO	Centre of Research and Development- Peru
EAGBN	East Africa Gender Budget Network
FEMACT	Feminist Activists Network, a Tanzanian NGO coalition
FEPOMUVES	Women's Popular Federation of Villa el Salvador-Peru
FfD	Finance for Development, UN Conference
FLACSO	Latin American Faculty of Social Science
FOVIDA	Fomento de la Vida- Peruvian NGO
FOWODE	Forum for Women and Democracy-Uganda
Gelede	Black Brazilian Women's Organization
GRB	Gender Responsive Budgeting
GSB	Gender Sensitive Budgeting
GSPB	Gender Sensitive Participatory Budgets
GUAM	México Metropolitan Autonomous University
IADB	InterAmerican Development Bank
IBASE	Brazilian NGO
IBP	International Budget Project
IBRD	International Bank for Reconstruction and Development
IDA	International Development Association
IDRC	International Development Research Centre of Canada
IFC	International Finance Corporation
IFIs	International Financial Institutions
ILO	International Labor Organization
IMF	International Monetary Fund
IDP	The Third Integral Development Plan- Villa El Salvador- Peru
INCRA	Institute of Colonization and Agrarian Reform-Brazil
IPU	International Parliamentary Union
IFII	Instituto de Formación Femenina Integral – Bolivian NGO
INDESOL	Governmental Institute for Social Development- Mexico
INEGE	Institute of National Statistics and Geography- Mexico
INESC	National Institute of Economics and Social Rights Studies-Brazilian NGO
KWIRC	Karnataka Women's Information and Resource Center, Indian NGO
MAD	Ministry of Agrarian Reform
MDGs	Millennium Development Goals
MINDES	Minister of Women and Social Development- Peru



MTEF	Medium Term Expenditure Frameworks
NCEMA	National Center for Economic Management and Administration-Nigeria
NGO	Non Governments Organization
OECD	Organization of Economic Cooperation and Development
PAP	Multi-Annual Plan 2004-2007-Brazil
PIO	Equal Opportunities Plan
PMI	Programme for Management Improvement - Chile
POA	Annual Operative Plan
PQSXXI	Quito Municipal Plan for the 21st Century-Ecuador
PRSP	Poverty Reduction Strategy Paper
REMTE	Women Transforming the Economy Network
REPEM	Feminist Educational Network of Latin America
SACHATENA	Indian NGO
SAP	Structural Adjustment Programmes
SERNAM	National Service of Women (Ministry) - Chile
SSF	Singamma Srinivasan Foundation, Indian NGO
TGNP	Tanzania Gender Networking Programme
UNAMG	National Union of Guatemalan Women
UNAM	México's Autonomous National University
UNAIDS	United Nations Joint Programme on HIV/AIDS
UNDP	United Nations Development Programme
UNECA	United Nations Economic Commission for Africa
UNFPA	United Nations Population Fund
UNHCR	United Nations High Commissioner for Refugees
UNICEF	United Nations Children's Fund
UNIFEM	United Nations Development Fund for Women
VES	District of Villa El Salvador - Peru
WB	World Bank



I. BACKGROUND TO THE PROGRAMME

The UNIFEM GRB Programme was launched in late 2000 in collaboration with International Development Research Centre of Canada (IDRC), the Commonwealth Secretariat and other partners. At that time, there were only a few national experiences of work on gender responsive budgeting around the world. They involved a limited number of partners including a few parliamentarians, some researchers and select government ministries. The experiences from South Africa and Australia inspired many researchers and activists to apply gender analysis to budgets. The Governments of Belgium and Italy provided initial funding for the programme as UNIFEM also invested its own funds. To promote a global commitment that all countries undertake a gender responsive budgeting by 2015, the Government of Belgium hosted a High Level conference in Brussels on 16-17 October 2001 - sponsored by OECD and supported by the Nordic Council of Ministers, the Governments of Italy, UNIFEM, the Commonwealth Secretariat and IDRC. The two-day conference gathered finance, development, budget, macro-economic and gender experts and practitioners, as well as parliamentarians and high-level policy makers from OECD, transition and developing countries. The conference communiqué endorsed by representatives of 47 participating countries widely disseminated and created political will for the GRB programme to ride on.

GRB Programme Objectives and Activities

UNIFEM's GRB programme has four main objectives:

- ?? To strengthen the capacity of governments to incorporate a gender analysis in planning and evaluating the impact of expenditure allocation and revenue raising at all levels to fulfill their commitments to promote women's rights and gender equality
- ?? To support strategies for women's participation in economic decision-making through their engagement in budgetary processes
- ?? To enable women to hold governments accountable for their commitments to women's rights, including the Convention on the Elimination of all Forms of Discrimination Against Women (CEDAW) and the Beijing Platform for Action
- ?? To advocate for and support the incorporation of gender into economic governance and leadership in order to increase women's participation in decision-making processes that shape their lives and to respond to the challenges of a global world

The Programme supports activities at global, regional, national and local levels to achieve gender equality and poverty eradication through research and capacity building, policy advocacy, networking and knowledge sharing. Globally, the programme supports the development of tools for applied gender analysis of expenditures and revenues for adaptation and utilization at country level. It promotes women's participation in economic fora and economic governance bodies, and advocates debate among international institutions on the link between achieving gender equality and economic policy-making. The country level initiatives for gender responsive budgeting include the examination and analysis of local budgets, national budgets and sectoral budgets from a gender perspective, and the study of gender-differentiated impact of taxation policies and revenue-raising measures. These efforts seek to promote dialogue among civil society, parliamentarians and officials responsible for budget policy formulation and implementation around gender equality, poverty and human development goals.

For the period covering 2001 – 2004, the programme budget amounts to Euro 2,354,988 from the contribution from the Government of Belgium and USD 423,000 from UNIFEM. These funds have been used to support global activities as well as national level work. The allocations for the countries have ranged between USD 75,000 to USD 175,000. In the cases of Egypt, Kenya, Nepal, Guatemala, and Chile the funds allocated were much smaller and came from UNIFEM's own contribution.



II. SCOPE AND METHODOLOGY OF THE REVIEW

The purpose of the mid-term review was to review progress made so far, assess the effectiveness of tools and capacity building strategies in use, and align programme activities with expected results. (See Annex 1 for Terms of Reference) This report presents the findings and recommendations from the review.

A team of two consultants was recruited by UNIFEM to carry out this mid-term review.¹ The team developed a plan for implementing this review and was guided by the following questions:

Purpose: How effective are the GRB initiatives in demonstrating the impact of macroeconomic policies on addressing gender inequality and poverty?

Strategies: Which approaches (e.g. national vs. local, general vs. sectoral, expenditure analysis vs. revenue analysis etc.) and strategies (e.g. capacity building, knowledge sharing, etc.) are more effective?

Tools: What kind of tools are being developed, and how useful and effective are they?

Partnerships: What types of partnerships yielded the greatest benefits towards achieving the projected results? What other partnerships are needed?

Management: How effective has the management of the programme been, especially with respect to monitoring and ensuring sustainability and results?

The review started off with an initial consultation between the reviewers, UNIFEM GRB Programme staff and donor agency representative. It was followed by a desk review of relevant documents and reports from the programme. The desk review benefited from a baseline study carried out at the time the Programme was launched². As a part of the desk review, the team developed matrices to map out the 20 pilot country programmes and their key characteristics. These matrices were intended to capture the general characteristics of the UNIFEM GRB pilots in a comparable manner around a series of issues including ongoing macroeconomic policy processes in the country, development priorities, other donor agencies supporting GRB work in the country, level of intervention, implementing partners, type of activities, tools used, UNIFEM role, relationship to other UNIFEM work, visibility, sustainability and impact.

From the 20 countries covered by the programme, 6 countries (Nigeria, Tanzania, India, Brazil, Peru, and Mexico) were selected for in-depth review and another 3 countries (Uganda, Nepal, Chile) were identified for secondary country analyses. These countries were selected according to how far along they were in the implementation of the GRB Programme. The team also paid attention to the range of partnerships and approaches at the implementation level. The different roles UNIFEM HQ, regional and country offices play in the process of launching; implementing and monitoring the pilots were also noted.

¹ The team consisted of Simel Esim (lead consultant) and Gina Vargas (consultant for the Latin America Region). The GRB Programme manager Nisreen Alami was the coordinator of the midterm review process. Key advisors to the process include Diane Elson (consultant to the UNIFEM GRB Programme), Yassine Fall (UNIFEM) Joanne Sandler (UNIFEM), Shoko Ishikawa (UNIFEM), UNIFEM Field offices and bilateral partners, and stakeholders at national and regional levels.

² This study was carried by Debbie Buddlender and included in Gender Budgets Make Cents published by the Commonwealth Secretariat in 2002. Her paper was useful to country programme planners, as they developed strategies to implement their projects and activities and served as a vehicle to identify best practices.



For the field visits a number of guiding questions were developed for UNIFEM Staff, existing/potential partner organizations, existing/potential donors funding GRB work in the country, and target audiences/beneficiaries of the programme.

III. REVIEW FINDINGS

Overall, the review found that certain regions or countries are stronger in some of the programme areas than others. For example, LAC region is leading with its innovations in the area of tool development. The Andean Region gender budget initiatives are emerging with strong local level budgetary analysis and participatory exercises. East Africa has spearheaded a knowledge network that is strong in policy advocacy and training and awareness raising aspects of gender budgeting among policy makers, NGOs and researchers. South Asia and Central America regions have strong research and capacity building tools. In a number of regions including the Arab States, South East Asia and West Africa cooperation with donor agencies, especially engaging with the World Bank on PRSPs, Medium-Term Economic Frameworks (MTEF), performance based budgeting and economic management capacity building exercises is a strategy of choice.

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- ?? Providing technical assistance and building the capacity of the partners and policy makers, providing a set of trainings utilizing international gender budget researchers and analysts (e.g. Ecuador, India, Morocco, etc.).
- ?? Being a catalyst for partners in launching a gender budget programme and leveraging funds and support from other donors for the programme (e.g. in Brazil with DFID, in Morocco with World Bank)
- ?? Contributing as one of many donors supporting budget work in countries and regions where this work has already been going on (e.g. Tanzania, Uganda, Mexico)
- ?? Leading in working closely with country partners in drawing a road map for pro-poor gender budget analysis (e.g. Nigeria, Sri Lanka, Nepal, Senegal, Egypt)
- ?? Enabling and innovating when it comes to ideas that other donors or international agencies do not see the value in contributing to (e.g. engendering macroeconomic modeling in Tanzania, looking into HIV/AIDS, gender and resources in Mexico, etc.)

This section of the report presents the findings of the review against the main review questions. The reviewers identified the progress in the GRB Programme since 2001 up to the mid-term review as a natural 'first phase' of activities. Therefore the period under review is hereafter referred to as the "first phase" of the programme throughout this summary report.

Purpose: How effective is the programme in demonstrating impact of macroeconomic policies on addressing gender inequality and poverty?

The review found that engaging with macroeconomic policies is emerging as a priority in the programme. In a number of pilot countries, UNIFEM and its partners are starting to identify and target a number of macroeconomic policy processes, including the public expenditure management reforms, and development of the Poverty Reduction Strategy Papers (PRSPs) (in Senegal, Uganda, Tanzania) and Medium Term Economic Frameworks (MTEFs) (in Morocco, Philippines, Belize), that are central to how governments allocate resources and make decisions about fiscal and monetary policy in developing countries. These processes provide an opening for using gender budget analysis tools for monitoring progress. There are also a number of pilots that are making the connection between gender inequality and poverty alleviation through gender budget analysis of poverty, employment, credit programmes.



Following are some details and examples of the involvement of the GRB programme in these macroeconomic policy processes:

Poverty Reduction Strategy Papers (PRSPs): Of the 20 current pilot countries in the first phase of the Programme, more than one-third of the countries are engaged in the PRSP process (Senegal, Tanzania, Uganda, Mozambique, Kenya, Nigeria, Nepal, Sri Lanka and Bolivia). In many cases, the partners that UNIFEM selected for the GRB Programme in these countries were already engaged as participants in the consultative process, in macroeconomic policy advocacy and the PRSP process, developing civil society critique and providing alternatives to the proposals in the PRSP documents, and the UNIFEM GRB Programme helped further their work. For example, GRB Programme partners FOWODE, as a part of the Women of Uganda Network, and TGNP, as a part of FemAct Coalition in Tanzania, have engaged critically with the PRSP process in their countries. TGNP has also been involved in influencing macroeconomic policy through the Gender Mainstreaming Working Group for Macro Policies (GMWG-MP).³ To date, the group has been involved in engendering the PRSP progress reports of 2001 and 2002, inclusion of gender expertise in the Technical working groups for Poverty Monitoring, and raising gender issues in the public expenditure review (PER) process and its related studies and surveys.

It is important to note that even in those countries where there is not a formal PRSP process, UNIFEM's partners are centrally engaged in monitoring and evaluating poverty relief programmes. In Mexico, partners are advocating for the introduction of a GRB approach in poverty relief programmes (PAC and Progresá) and have analyzed these programmes in order to see if structural problems that affect women are being addressed in these programmes. The findings showed that there was no gender perspective in the appraisal guidelines and methodology. Another study is estimating women's load of work in these programmes. Programme partners in Mexico are also participating in the *Poverty Observatory*".⁴

In the next phase of the Programme UNIFEM can benefit from deepening its activities connected to the PRSP process in the pilot countries that are already engaged in PRSPs. The Programme can engage with the PRSP process to ensure that poverty alleviation strategies are more gender responsive and mobilize resources for poor women. UNIFEM and partners can play a key role by generating a debate among the various stakeholders of PRSPs on gender and macroeconomic issues and working toward increased capacity for gendered poverty analysis and the understanding of national economies from a gender perspective. The monitoring and evaluation of poverty alleviation programmes, such as those in Mexico, India and Sri Lanka, are likely to bring about change in the way the programmes are designed and implemented through such direct engagement.

Public expenditure management reforms including Medium Term Expenditure Frameworks (MTEF): Many developing countries are adopting public finance practices such as public expenditure reviews, MTEFs, economic data management reforms usually initiated by IFIs and Ministries of Finance and Planning. The processes for these efforts are usually described as participatory and aim to achieve transparency, accountability and efficiency in budget systems. Although the very early GRB activities were not necessarily tuned into these processes, in the process of the first phase of the Programme this has become an important area of work especially in

³ This is a group comprised of representatives from government, donor agencies and NGOs in Tanzania. It works to ensure inclusion of gender issues and concerns in policies and guidelines.

⁴ Poverty observatory is a governmental project developed in partnership between UNIFEM and SEDESOL (Social development Secretary) in order to study and to "observe" the perceptions and experiences of poverty, both material and subjective, from a gender focus. It is focused on a qualitative and quantitative analysis of the intra-household dynamics within poor urban households where power differentials between sex and age are produced and reproduced reflecting in access to decisions and productive resources.



countries like Chile, Morocco, Egypt, and the Philippines. For instance, the Programme pilot in the Philippines is closely engaged with the evolving performance-based budgeting effort in the country. Similarly, the implementation of the GRB Programme pilot in Morocco is being connected to the new governmental policy geared towards the introduction of a results-based management style in public sector work through the MTEF. The MTEF sets out three-year spending plans of the national and local governments in order to ensure that budgets reflect Government's social and economic priorities and give substance to Government's reconstruction and development commitments. In Belize, the Programme pilot is beginning to providing technical assistance for research and analysis on the impact of national budget expenditures and resource allocation on men and women, focusing on some key sectors: housing, access to credit, employment and health, as they appear in the Medium Term Economic Strategy 2003-2005, and the National Poverty Elimination Strategy and Action Plan 1998-2003. It is still too early to tell the impact these programme pilots will have on the MTEF process. *A note of caution is in order however, for the GRB programme activities around MTEFs to go beyond the simple analysis of impact.*

In this context, the partnerships which pose the most challenge for the GRB Programme are Ministries of Finance, other planning and spending ministries as well as Central Statistical Offices and Central Banks as they are rather new partners for UNIFEM and its traditional constituencies (see under partnerships).

In terms of the effectiveness of the GRB Programme in demonstrating macroeconomic policy impact on gender equality, the Programme has supported applied gender budget research as a way to influence the budgetary policy process with the explicit intention of advancing women's economic, social and human rights, women's empowerment, gender equality, and poverty alleviation goals. Following is some analysis of the kinds of research conducted and the effect that the research conducted under the Programme has had.

?? Policy research with strong examples of case studies, programme specific analysis, etc. has been produced in several of the GRB initiatives. The case studies from Mexico, Peru and India (West Bengal) are worth noting for their strong analysis. Others have had less well-designed analysis that might not be as in-depth as needed (Uganda, Tanzania).

?? More theoretical and conceptual research dealing with how processes ought to run as opposed to how they really run have also been undertaken in Nigeria (budget process paper) and in India (Karnataka, "Building Budgets from Below"). The global review papers commissioned by the programme such as Rhonda Sharp's paper on performance based budgeting and Diane Elson's research on CEDAW as they related to gender budgeting are also in this category of research. These global reviews have had much more visibility compared to the country level studies.

?? The Nigeria pilot has had a good launching with the research and training manuals. It was also strategic in identifying a multi-donor economic management capacity building effort with the government as its entry point.

?? In India, a study by National Institute of Public Finance and Policy (NIPFP) in collaboration with the Department of Women Child Development, Department of Economic Affairs, Ministry of Finance supported through the Programme resulted in a section on 'gender inequality' in the Economic Survey 2000-2001, making it the first time that the Economic Survey had a chapter on gender. The Economic Survey in the subsequent year also included chapters on "Women in the Work Force" and "Development of Women and Children" drawing from the NIPFP study.

?? In Brazil, Centro Feminista de Estudos E Assessoria (CFEMEA) carried out an analysis of the federal budget in Brazil. Partners there focused on illustrating comparative gender analysis of local expenditure in public budgets on services affecting women and men. In doing so, they analyzed



planning and budgeting practices, and their impact regarding contribution and /or reduction of gender inequalities.⁵ They asserted that it is possible to analyze budgets as a manifestation of political will, composed by a number of documents that express the government's direction regarding priorities and options. But a more comprehensive understanding of governmental actions is given, in practice, by the comparison between budget and presenting expenditure accounts (analysis of impact of expenditures made). With this tool, they effectively verify where resources were spent, making identification of governmental intention and action possible.

GRB Programme research has fed into policy advocacy at international (United Nations, Commonwealth, OECD/DAC, AWID, World Social Forum), regional (MERCOSUR, IGAD, SADC, SARC), national (Ministries of Finance, Planning Commissions, Statistics Offices) and local levels (States and Municipalities). In some cases governments have even introduced necessary reform and policy changes in response to the findings of the analysis. For instance, in both Tanzania and India gender budget language has been introduced into budgetary guidelines through the budget analysis and advocacy supported by the GRB programme. Emerging results from the completed gender budgets analysis exercises at local and national levels show that the effort can lead to substantial policy change.

However, the review also observed some of the current limitations in the transition of research into advocacy tools to prompt government action. Naturally, effectiveness of research in influencing policy depends on its quality. In the GRB programme pilots conducted by strictly public finance research institutions, such as NIFPF in India, the quality of the budget research is high caliber, but not necessarily complemented by gender and social analysis that can make it relevant as a tool for advocacy, training, and mobilization toward gender sensitive policy change. The research by gender researchers and women's NGOs and activists are sometimes lacking in rigorous analysis of economics and public finance to convince the policy makers and economists. *This points to the need to build stronger alliances between budget groups and research organizations experienced in public finance and economic analysis with gender experts and activists.*

Another limitation is the absence of an advocacy strategy in many of the research designs, that identifies the types of links that need to be established for the research findings to influence policy change. For example, in the case of Peru, the information produced via the Programme remains an academic exercise isolated from the participative budget process, the NGOs working in the district, and also from potential allies within the municipality such as the women members of the city council. Also in the case of Nigeria, although the researchers undertaking the GRB work are high caliber in their analytical skills, they are not policy advocates and not the ones who can push the gender budget agenda forward with policy makers. *In both these cases the research needed to be connected with other partners such as women's groups and budget movements in civil society who can translate the results into policy advocacy.* For instance, the Tanzanian partner of GRB Programme TGNP launches most of its policy advocacy through a coalition of 40+ NGOs, FemAct.

Finally, there are resource constraints for active follow up and monitoring to ensure that the effect of the research and advocacy leads to policy impact. For example, while the pilots in Tanzania and India were successful in including gender budget language into budgetary guidelines, the impact this

⁵ They start from the diagnosis that the municipal budget is normative and requires sensitizing. The surveys on public expenditure have privileged approaches that identify the nature of incomes and expenses and their territorial application (health, education, housing, etc.) over any other approach. Another recent tendency in public policies is their orientation to universalizing the access to public services by connecting such practice with the notion of civil citizenship. Even if this means a relative progress, by lacking a segregated perspective, it has the limitation of hiding inequalities between men and women. Similarly, statistical data does not highlight gender asymmetries. The association of these three factors reinforces invisibility and the eventual absence of acknowledgement of gender inequalities by governmental actions, making social control over public policies difficult.



might have had on the preparation of the actual budgets by sectoral ministries has not been monitored.

Strategies: The programme is supporting gender budgets initiatives following different approaches. What approaches have proved more effective and why?

Gender budget exercises can be applied in a wide range of ways. The Programme has generated innovations and responded to new opportunities and challenges in the following areas: Local level analysis, revenue analysis, using different entry points in the budget stages, integrating a human-rights approach, training and capacity building, knowledge networking.

National level analysis or Local level analysis

Most of the gender budget initiatives around the world focus on the national budget whether they are research, capacity building or policy advocacy initiatives. Australian, South African and British initiatives were all national level initiatives. The first training manual on gender budgeting was developed for national level policy makers (Budlender, Sharp, 1999). In the case of the GRB Programme also, 18 of the 20 countries that the programme supports are undertaking national level activities. The countries include India, Kenya, Tanzania, Bolivia, Mexico and others. For example, in Nigeria, a study was conducted to analyze the national budgeting processes, including the actors, at the Federal, State and local tiers of government to identify entry points for gender sensitive budgeting. In India, an analysis is being conducted on national budgets and economic/fiscal policies with the help of a mix of agencies/individuals, which command respect from economists and from the finance/economic ministries and leading feminist economists in the country. Additionally, the Center for Social Studies is carrying out a national level budget analysis looking at the impact of new macro-economic and trade policies on women's position as workers and consumers in the garment manufacturing industry, including government incentives to export zones and its implications for women

GRB Programme also has quite a few local level pilot initiatives responding to the global fiscal decentralization trends. These include initiatives in Peru, Ecuador, Nigeria, India, Bolivia, Uganda, and Ecuador. To better understand the opportunities and challenges that decentralization brings, UNIFEM GRB Programme co-organized a seminar in May 2002 in Italy entitled "Rethinking gender, democracy and development: Is decentralization a tool for local ownership an effective political voice". The seminar brought together academics, the UN staff, and NGOs to discuss political decentralization and decentralization of social services and financial resources, and its implications on women's lives. Decentralization, especially fiscal decentralization is expected to bring budgeting closer to communities. While decentralization can complicate the coordination and monitoring of budgets nationally, the hope is that greater citizen and local legislative involvement will be possible.

In the last decade, the Latin America region in particular, has seen a great movement towards state reform and decentralization. In this context, a significant number of local governments are working to develop and implement citizen participation mechanisms in order to ensure transparency and accountability. This presents a unique opportunity to work on new forms of local planning, budgeting and reporting in which people's demands are better reflected and in which citizens become active subjects of policymaking. Within these processes, correctly identifying and addressing gender inequalities and women's specific needs and interests is critical to ensuring democratic and equitable development. UNIFEM's Andean regional office's primary gender budgets focus on local-level governance. This signifies the linkage that the Programme is making with the local level participatory budgeting movements in that region.



These local level initiatives of the GRB Programme are also receiving attention and being supported by a range of donors. A proposal submitted to the European Commission entitled “Local Level Gender Budgets Initiatives” was approved in December 2002 for the amount of Euro 800,000. The project implementation is starting in late 2003.

Sector specific interventions

The review found that the Programme is also encouraging the application of gender responsive budget analysis in cutting edge issues. In Mexico, the National Centre for HIV/AIDS Prevention and Control (CENSIDA) has shown awareness and interest in introducing tools to analyze the HIV/AIDS spending in four states in Mexico. Similarly in Africa, participants of a regional workshop on gender responsive budgets organized in August 2003 by UNIFEM with Women’s Action Group in Zimbabwe to expand the pool of trainers on gender analysis in Southern Africa agreed that gender responsive budgets could be a powerful tools in addressing policy issue related to HIV and AIDS. Women’s Action Group subsequently analyzed the use of the National AIDS Council funds using the skills gained through the workshop. Gender Budget analysis of resource allocation for HIV/AIDS also emerged as a priority from the East Africa Gender Budget Network Second Conference in Entebbe in November 2003.

Other applications of gender budget analysis in the Programme have been with regard to domestic violence in LAC region, and access to water in a number of African countries among many others.

Expenditure analysis or Revenue analysis

Most of the budget analysis completed under the GRB Programme so far have focused mainly on the government expenditures. The analysis of revenue policies is a less developed area of work. During the first phase, the Programme has piloted some gender analysis of taxation policies and started to address the need for conceptual understanding of the gender implications of taxation policies, although to a lesser extent compared to working on government expenditures. The present examples of these attempts come from Senegal, Kenya, India, and Mexico. In India, UNIFEM Programme partners are conducting an analysis looking at both investments and taxation decisions from a gender perspective. In the programme pilot in the state of Oaxaca, Mexico the national women’s machinery provided technical assistance to the Ministry of Finance in the context of the fiscal reform process toward the development of sex disaggregated fiscal indicators that allow for better tracking of contributions of women to tax revenues.

Using different entry points in the budget process

There are four key stages to the budget process that create different opportunities and strategic entry points for gender responsive budgeting. These are: budget formulation, enactment, execution, and auditing and assessment. While we can loosely talk about these phases of the budget process, they are not clearly separated and usually overlap. The review observed that so far the focus of GRB Programme partners has mostly been ex-post facto analysis somewhere between the auditing and assessment and budget formulation phases of the cycle.

Following is some more detail on the involvement of the Programme in the different budget processes.

Budget formulation stage: This is when the budget plan is put together by the executive branch of government. During the development of the budget, NGOs can release analyses on issues known to be under consideration, or that they believe ought to be priorities, with the hope of influencing the budget being formulated. In a number of countries, as a result of the Programme initiatives, budget guidelines have included specific language on gender budgets including India, Nepal, Mexico, Tanzania, Uganda, and Egypt. However, this inclusion is not sufficient if not used by the budget departments of sectoral ministries preparing their yearly budget submissions. In the case of Tanzania, the initiatives of TGNP has succeeded in integrating some gender responsive language and sections on gender budgeting into the guidelines of the Ministry of Finance. *More engagement*



in the budget drafting stage requires closer work with Central Ministries (Ministry of Finance, Planning) and sectoral ministries' budget and planning departments. The gender budget groups need to provide assistance to these ministries in terms of specific guidelines, checklists, and analysis tips toward integrating gender into budget drafting/planning stages.

Enactment stage: This is when the budget plan may be debated, altered, and approved by the legislative branch. As a part of the GRB Programme, there is ongoing work with national and local level representative councils in Senegal, India, Brazil and Mexico. In Southern and Eastern Africa, women parliamentarians have played crucial and transformative roles in moving gender budget work forward on the national agenda. They continue to be strong allies and supporters of the programme pilots in these regions. In Mexico, for instance a workshop with parliamentarians was held in September 2002 for members of the parliament committees on finance and gender equality. UNIFEM is also in communications with the Network of Women Parliamentarians of the Americas that recently organized a workshop on gender budgets in El Salvador for Central American Parliament with participation of GRB Programme partners from the region. In India, UNIFEM is working with the national parliament for utilization of gender responsive guidelines in allocating the discretionary resources that are allocated to MPs. The work in Senegal also focuses on members of parliament.

Globally, the Programme is also collaborating with the Inter Parliamentary Union (IPU) to provide technical support to a publication that is co-funded by UNDP and the World Bank Institute. The resulting guidebooks will be used in IPU's training activities targeting members of parliament and parliamentary staff members.

Execution stage: Once the budget has been enacted, related policies are carried out by the government. Governments differ widely in how they regulate and monitor spending to ensure adherence to budgets. In some cases, the Treasury (or Finance Ministry) exercises strong central control over spending, reviewing allocations to departments and approving major expenditures. Due to weak public implementation capacity, leakages and lack of accountability mechanisms, applied gender budget groups need to focus more on execution stage issues such as monitoring allocation and actual expenditure. Within the GRB Programme, the analysis of Swarnajayanti Rozgar Yojana, the largest single poverty alleviation project of the Government of India, carried out by Sachetna and the review of health sector spending in Mexico are two examples of work focusing on the execution stage of the budget in order to determine how the spending is reaching which beneficiaries.

Auditing and assessment stage: This is the stage when the actual expenditures of the budget are accounted for and assessed for effectiveness. The findings from this stage also inform the next stage of policy and programme design. Evaluation and auditing stages offer an opportunity for gender budget actors to prepare their alternative reviews from a gender perspective or to advocate for inclusion of a gender perspective. *This opportunity needs to be seized by the gender budget researchers and advocates participating in the GRB programme informing and engaging with sectoral and central government ministries at the national and local levels.*

A powerful example of GRB engagement at the various stages of the budget process is taking place in India by the Karnataka Women's Information and Resource Centre (KWIRC) based in Bangalore. With the GRB Programme support KWIRC initiated 'Building budgets from below' that focuses on mainstreaming a gender perspective in budget formulation and builds on a participatory gender audit implemented at district level earlier. As part of this initiative, stakeholders formed an association of elected local women Panchayat (local council) representatives in four districts, and consulted with 30 organizations to build a coalition of support. The initiative also seeks to build budget literacy and budget engagement of women Panchayat members in rural parts of the state.

Integration of the Human Rights Approach



The review found the Programme unique in the way that it addresses the issue of resource allocation from a human-rights based approach. This goes beyond programmes solely emphasize principles of efficiency and transparency to improve economic management. UNIFEM's GRB Programme does not start from systems, or institutions but has people, especially poor women, and their rights to equal access to public resources with men, and better access to public resources as poor people as its starting point. This is its driving force, and primary concern, even when it overlaps and agrees with other institutions' emphasis on better management of resources.

Many of the partners of UNIFEM, from Sachatena in India or FOWODE in Uganda to Equidad in Mexico, work within a human rights framework and are addressing issues of economic justice and social exclusion. At a global level, the Programme has supported Diane Elson to undertake research to place the discourse around applying gender analysis to budgets within a human rights framework. This approach has been aided by links with CEDAW and the other UN conventions relating to social and economic rights, and through the relevant UNIFEM advisors assisting in developing targets, indicators and benchmarks.

In the Latin America region, the gender budget initiatives are being implemented within the regional Economic and Social Rights programme called DESafíos. The DESafíos programme seeks to integrate a human rights and gender equality perspective into national programmes and, consequently, into federal and municipal government budgets. To this end, many of the local level GRB initiatives in Latin America have been built on the strong human-rights principle of participation. In Ecuador, for instance, GRB interventions in all the municipalities have been carried out based on principles of participation, empowerment and search for equality. Even in those, such as Quito, where the emphasis was placed on research, a dynamic discussion process was carried out through forums to report on the research (with public officers, local authorities and a representative) and meetings with Management Committees of the Social Councils (women, children, adolescents, older adults, people with disabilities, black people, and indigenous people) working in the construction of local GRB.

In Brazil, the programme "Support for Integrated Actions in Gender and Race Equity in Brazil" also reflects the use of gender budget analysis as a tool to bring about greater transparency of governance, and eliminate discrimination based on gender, race and ethnicity. The programme, undertaken with DFID-UK, aims to build the capacity of ministries to fulfill its obligations to all people and empowering civil society organizations to claim their rights using gender budget analysis as a monitoring tool.

Training and Capacity Building

The training (i.e. individual budget actor and partner training in tools, techniques, etc.) and capacity building (i.e. supporting partner institutions to be more effective in gender budgeting) component of GRB emphasizes building national ownership and fostering institutional collaboration as well as the establishment of networks of experts and organizations on gender budgets. This component of the programme provided three types of support:

The first type of training provided by Programme pilots is around awareness raising and capacity building exercises mainly with women's NGOs in order to impart advocacy skills around gender budgeting. The review found that the programme has created a group of people strategically located in institutions that can engage in budget research and train and advocate with others on the issue. It also contributed to a gradual shift in recognition of gender issues as budget issues among fiscal policy makers. Southern Africa region, Eastern Africa region (Tanzania, Uganda), Latin America region (Mexico, Brazil) are examples. It is important to note that gender budget training with economists/budget researchers need to be tailored differently from training with NGOs. In a number of pilots this is indeed the case, in others not. For more in-depth and thorough concentration on policy advocacy, media outreach, or research tools, different training modules are needed for these different audiences.



A second type of training and capacity building exercise focuses on application of the gender budget analysis tools and concepts to monitoring macroeconomic policies, PRSP, MTEF processes, etc. While the programme has been highly effective in awareness-raising among partners and budget actors at all levels, it has not yet achieved the more in-depth capacity building and training leading to the wider application of tools, techniques and concepts by mainstream institutions and budget actors in these macroeconomic processes. Training efforts with economists have clear multiplier effects where they can take ownership of gender budget research tools, they also have the potential to serve as resource persons, and carry out training of trainers to governments and civil society organizations and to continue on undertaking their own research projects exploring gender issues in budgets further.

A third type is the training on gender and macroeconomics targeting women's NGOs and economists that UNIFEM has been organizing under the larger UNIFEM Economic Security and Rights and Governance programmes where gender budgets is featured as part of the module. Workshops have been held during the Commission on the Status of Women in March 2002 in New York City, in Latin America with UN ECLAC in August 2002, and in Africa in September 2003 in collaboration with UNECA-ACGD and NAWA. This type of training is a good example of complementarity, and value added between UNIFEM's overall programme on gender equality and the GRB Programme.

Knowledge Sharing and Networking

The Programme emphasizes sharing methods, tools and experiences among the pilot countries and beyond as a strategy to build stronger expertise and commitments to GRB analysis around the world. The review also looked into the effectiveness of this knowledge sharing and networking.

In the South Asia region, as a means to share methodologies and the results of studies that have been conducted under the Programme across South Asian countries engaged in gender budget initiatives, and a monograph series named "Follow the Money in South Asia" was recently launched. The first publication from this series, a summary of Nirmala Banerjee's overview of gender budgeting concepts, tools and methods as they apply to the Indian context, was published in August 2003. This monograph series is a good awareness raising, policy advocacy and capacity building tool of gender budgeting in South Asian countries, and a good example for other regions to follow.

The South-South exchange visits and regional/sub-regional networks are emerging as good practices. In South Asia, the Programme organized a study tour to South Africa for officials and experts in November 2002 grounding their exposure to gender budgeting through their readings and workshops in actual observations and interactions with the experts in South Africa who have been involved in gender budgeting for much longer.

East Africa Gender Budget Network (EAGBN) is a good example of a formalized sub-regional knowledge network for regional exchange visits, regional conferences, network activities such as joint learning/training, multi-country projects with comparable methodologies, regional fundraising, engaging with regional bodies and a resource pool of budget actors. UNIFEM along with UNDP and others has supported the development of this network. The EAGBN example is being followed by other sub-regions. The midterm review shows that pilots in South Asia are emerging with an informal sub-regional knowledge network, and discussions on a more formalized network are under way. Among pilots in LAC region a range of expert networks, forums, and materials provide the building blocks for a regional network. The Andean sub-region with a strong sub-regional knowledge dissemination strategy is the closest to functioning as a knowledge network in the region

The gender budget website is also emerging as an important vehicle for outward knowledge dissemination and increasing visibility of the programme. The review found that the Gender Budget



Initiative website (www.gender-budgets.com) has not attracted many users and is in the process of being reformulated and relaunched by IDRC.

The above are replicable approaches that have yielded preliminary results throughout the Programme. *As the programme evolves into its second phase, the learning from the pilots need to be systematically consolidated and documented for wider dissemination and used to influence budgetary policies. Monograph series similar to that in South Asia can be launched in East Africa and Latin America where there are substantial number of documents from the first phase. It is also perhaps possible to envisage “regional and linguistic nodules” for networks that act as resource centers. In Spanish speaking Latin America, this could be Mexico, and for the Portuguese speaking countries Brazil. In the case of South Asia, India is emerging as a regional center. For Francophone countries, Morocco or Senegal could be countries where such network nodule functions could be developed.*

During the midterm review, UNIFEM’s staff members also expressed need for a stronger internal knowledge network to help them in their day to day management of the pilots as a priority. UNIFEM now has started an internal Community of Practice that serves as a platform for knowledge exchange and discussion among the GRB programme staff and partners.

Tools: A general assessment of tools developed for analyzing expenditures, revenues and budget processes. How useful and effective are the tools developed so far?

Among the Programme’s partners are groups that have adapted existing tools and also those that have developed new tools. Country-specific tools to support gender budget analysis are being developed in the Andean Region countries, Brazil, India, and Tanzania -- adding knowledge to the more general conceptual frameworks provided by Diane Elson, Debbie Budlender, Rhonda Sharpe and others.

Using and adapting existing tools

In the past decade feminist economists around the world developed a number of tools for gender analysis of budgets. These tools were based on the needs and realities in the contexts of Australia, and South Africa and efforts to bring in gender perspectives to macroeconomic analysis and budgetary policy processes in the countries. Rhonda Sharp’s three categories of public spending (women specific, equal opportunity spending and mainstream spending); Diane Elson’s six categories of analysis (sex disaggregated beneficiary assessments, sex disaggregated public expenditure incidence analysis, sex disaggregated policy evaluations of public expenditure, gender-aware budget statements and sex disaggregated analysis of interactions between financial and time budgets), Debbie Budlender’s training modules and work on time use and care economy are among the tools that have received most attention in recent years.

In the first phase of the GRB Programme, these tools have been presented in training workshops, seminars, training materials, and research documents around the world for awareness raising with multiple stakeholders in order to engender macroeconomic policies and budgetary processes. In many cases, the key authors were involved in the Programme activities to present them, in other cases they were presented by others who have read and reviewed their materials or attended workshops with them. These tools have been adapted by Programme partners with different levels of success and frequency. Rhonda Sharp’s three categories were used India to identify the types of government programmes and project that they would analyze. They chose anti-poverty programmes and employment creation schemes with general target populations of poor and unemployed (category three type programmes), but they also had certain women’s components in them (category one type programmes). Of the six tools of engendering budgets by Diane Elson, sex disaggregated policy evaluations of public expenditure was the most widely used tool. In Nigeria, the 10 module



training ‘Money Matters’ developed by Debbie Budlender was adapted, building examples and exercises based on the findings from the studies in Nigeria. More of these kind of uses and adaptations of the Money Matters Training modules can be encouraged in the second phase

These existing tools have been seminal in forming the basis of the majority of GRB exercises, and while adapting these tools, GRB partners in the field have developed their own critiques on them. The limitations to the existing tools identified by partners are summarized below in Text Box 1.

Text Box 1: Partner Critiques on Gender Budget Analysis Tools and Methodologies

- ?? Presuppose a governmental machinery that works, and assumes an ideal scenario
- ?? Uses purely economic rather than political approaches – and not only technical, cost-benefit approaches- to understand undergoing processes
- ?? Lacks a clear rights based approach and do not tackle race issues
- ?? Useful conceptual analysis tool rather than a tool for applied analysis
- ?? Qualitative and descriptive in nature and do not provide substantial evidence
- ?? Do not provide insights into the formulation of budgets, or the overall budget process
- ?? Good for gender awareness raising, but not for in-depth analysis of public budgets
- ?? Sex-disaggregated data is often not available for the analysis suggested with the tools proposed (benefit incidence, time use, etc.)
- ?? Point of entry is mainly ex-post facto, while there is need to engage across the budget process with the analysis
- ?? Focuses on the national level and requires tailoring to be applicable/relevant at the local level

Developing New Tools

The GRB Programme partners and researchers allied with the Programme have been developing new tools that respond to the critiques listed above. Many deal with issues that require multi-sectoral tools and methodologies for analysis (e.g. domestic violence), carry time sensitive urgent response requirements (e.g. HIV/AIDS, post-conflict). Some of the new tools and methods emerging from the Programme are summarized below in Text Box 2.

Text Box 2. New Tools and Methods Emerging from UNIFEM GRB Programme Pilots

- ?? Mapping of the budget process
- ?? Differentiation of local budget analysis from national budget analysis
- ?? Methodology for gender budget analysis of multi-sectoral issues such as domestic violence
- ?? Gender budget analysis integrated into all stages of the budget process
- ?? Gender budget analysis methods building on pro-poor and participatory budgeting
- ?? Developing indicators to enable monitoring of relevant data
- ?? Beginning to apply gender budgets as a monitoring tool for MDGs, PRSPs, and CEDAW
- ?? Exploring links between MTEF, performance budgeting and gender budgeting
- ?? Developing the building blocks of gender revenue analysis

Mexico has made the most progress in building methodological and analytical skills. The Programme partners reviewed the global toolkits and documents closely as they were starting, and while they found some of the tools useful, they determined that others were not as relevant or strategic considering the data available in-country, or the institutional and political environment around the budget process. Therefore, they needed to adapt the existing tools or develop their own



tools to undertake the work. Especially FUNDAR, a Mexican research NGO which has a high technical capacity with regard to gender analysis of budgets, has been active on issues of applied budget analysis, pro-poor budgeting and budgetary transparency for a number of years as a member of the network for the International Budget Project (IBP), and is now applying the learning from the tools and trainings in the IBP to gender budgeting.

Partnerships: What types of partnerships have yielded the greatest benefits towards achieving the projected results? What other partnerships are needed?

The GRB Programme is about strengthening the commitment and capacity of national partners (government and civil society) to use gender responsive budget analysis as a tool to promote gender equality. This section of the report analyzes the partnerships that UNIFEM has developed with the different actors in piloting various approaches to GRB.

Government

Central ministries: These include Ministries of Finance, Women's Affairs and other planning and spending ministries as well as Central Statistical Offices and Central Banks. The Programme works closely with the women's machineries in those countries where the women's machineries have been mandated by the government to take the lead in gender budgeting. For example, UNIFEM's implementing partner in the Philippines is the National Commission on the Role of Filipino Women (NCRFW) who is the oversight agency in charge of coordinating the implementation of the 'GAD budget policy'⁶. In the case of India, the Department of Women Child Development (DWCD) is one of the main partners, together with the Department of Economic Affairs and Ministry of Finance. DWCD has taken the decision to expand gender budget analysis to 20 states in the country – in collaboration with the National Institute of Public Finance and Policy (NIPFP). While their focus is on women's components, this is an important example of the government taking the lead in gender budgeting.

Working with Ministries of Finance, other planning and spending ministries as well as Central Statistical Offices and Central Banks poses the biggest challenge in working on gender and macroeconomic policy issues as they relate to budgets. As Ministries of Finance are not traditional constituencies of gender activists or UNIFEM until the past few years, their recognition, engagement and final ownership of the gender budget process has been more of a medium to long term outcome with possible proof toward the latter part of the second phase in the programme. The case of Morocco and the close partnership between UNIFEM and the Ministry of Finance provides an interesting example that should be closely monitored and learned from.

Sectoral ministries: The Programme engages with a range of sectoral ministries from the Ministry of Education in India and Nigeria, the Ministry of Health in Mexico and Uganda, Agriculture in Brazil and Water in Tanzania. In Mexico the most immediate partners are the Health Ministry, the health sector in the states where the project is implemented, the women's organizations willing to participate in advocacy, Federal District and the states, and the Parliament⁷. In Brazil, as a result of the GRB Programme pilot with the Ministry of Agricultural Development, the Ministry has recently

⁶ The GRB policy in the Philippines is commonly referred to as the "five percent GAD budget policy". It is prescribed in a section of the annual General Appropriations Act which has the force of a law. It requires government agencies to utilize at least five percent of their respective total budgets for programmes and projects that address the needs and uphold women's rights. This has been viewed as a separate process from what is commonly advocated as gender budgeting.

⁷ It is interesting to notice that the project does not include the Women's Ministry as a partner or a target, but it does include an academic group from UNAM.



launched a programme of affirmative action policies of gender and race within the Ministry and for rural women.

The selection of sectors seem to be based on a) availability of data, b) willingness of sectoral leadership in government to work on gender budgeting, c) knowledge and experience of the GRB partner in the specific sector, and d) priority and importance the sector gives to gender inequality and poverty. This is why the most common sectoral partnership seems to be around health and education. The challenges of extending the partnership to work with less common ministries such as infrastructure, transportation and energy for gender budget analysis seem to be mainly three-fold: a) Gender awareness of these ministerial leadership and officials is quite low; b) The data from these ministries such as the utilization of units are not sex disaggregated nor are there any gender indicators included in their data collection, tracking, etc. For instance, access to water and sanitation across gender, hospitalization data across gender etc might be available disaggregated by sex only at the local clinics or rural centers rather than in the aggregate at the central budget departments of these ministries. And c) the partner organizations from civil society, mainly women's activist organizations, are also not as familiar in working on these sectoral issues

Civil Society

UNIFEM continues to work with a wide range of civil society actors on gender budgeting including: women's organizations, trade unions, independent economic and social researchers, media, social justice groups, women's studies organizations, and representatives of political parties. Women's NGOs and leaders of the women's movement consider UNIFEM as an ally, collaborator in the countries where there are UNIFEM offices. UNIFEM's close alliance with civil society organizations is a very important comparative advantage of the GRB Programme in all the pilot countries as the organization has credibility with governmental as well as non-governmental actors. It can act as an entry point for women's NGOs to engage with other UN agencies, donors, and at times even their own governments.

In Brazil both CFEMEA and IBAM acknowledged UNIFEM's leading and catalyst role in gender budget work. IBAM's perception of UNIFEM is that of an agency that works on innovative issues and contributes to filling information gaps. For CFEMEA, the most important feature is that UNIFEM is an important ally to develop policies from a feminist perspective. Although amount of funding has been small, UNIFEM has always tried to help them in fundraising. CFEMEA also acknowledges the catalyst role of UNIFEM with regard to new issues and proposals. Compared to other UN agencies, UNIFEM is the only one that actively acknowledges and works with the women's movement, especially feminist activists in the country. They also think that UNIFEM could undertake a more active role within UN, raising awareness in other agencies that have more resources.

One group absent among UNIFEM's partners is the Pro-Poor Budget Groups. These groups work in their own informal decentralized networks regionally and globally. They have also developed tools and experiences that can bring a unique contribution to the work on applied gender budget analysis and advocacy. *The reviewers recommend that such alliances would have the added value of: mainstreaming gender in pro-poor budget analysis; building joint strategies around engaging/influencing the PRSP process; learning from each other's successful strategies, tools and techniques for research/analysis as well as training/capacity building and dissemination and advocacy.*

Lawmakers

The Programmes has engaged with parliamentarians and elected officials at national, regional and local levels. In Southern and Eastern Africa, women parliamentarians have played crucial and transformative roles in moving gender budget work forward on the national agenda. They continue to be strong allies and supporters of the programme pilots in these regions. In Mexico, for instance a workshop with parliamentarians was held in September 2002 for members of the parliament



committees on finance and gender equality. The workshop helped to promote dialogue between members of parliament and their constituencies with regard to gender equality and budget decisions. UNIFEM is also in communication with the Network of Women Parliamentarians of the Americas which recently organized a workshop on gender budgets in El Salvador with participation of Programme partners from the region for the Central American Parliament. The parliamentarians are still not a fully tapped resource in the case of the GRB Programme. While in many countries they do not have much of a say in the budgetary process, capacity building and advocating with them can result in the empowerment of the MPs as well as bringing the priority issues in gender budgeting to the forefront in the national/regional agendas. *More work can be done with international, regional, national parliamentary bodies, women's caucuses and finance committees in the parliament.*

Regional organizations

UN ECLAC and ECE have been partners, especially in the context of regional training workshops to develop pools of experts in the area of gender analysis of budgets and economic policies. Pilots in East Africa and South Asia have a commitment to broaden partnerships with regional organizations in the next phase. There are other opportunities for the Programme to work at a regional level with regional bodies toward gender integration into policy and programmes of the governments.

International and bilateral organizations

Within the UN system, the strongest collaboration is with UNDP in terms of mutual technical assistance and collaborative programming that builds on opportunities that programmes of each agency presents. There has been active information exchange with other agencies such as UNICEF, UNCDF, and UNFPA. Other collaborating organizations include the IPU, the Commonwealth Secretariat, the Inter American Development Bank, the World Bank, OECD and a number of bilateral development organizations such as DFID and GTZ. UNIFEM responds to frequent requests from these organizations to provide technical input and present the experiences of the gender budgets work especially at the local, in-country levels.

Management: How effective has the management of the programme been, especially in monitoring and ensuring sustainability and successful results?

The Programme has one Programme Manager in UNIFEM HQ who manages the global level initiatives such as the cutting edge studies on CEDAW and Gender Budgets, and Performance-based Budget, knowledge dissemination, donor reporting and resource mobilization. The Programme Manager also maintains an oversight of the regional and country level initiatives in order to track programme results, and facilitates knowledge-sharing between sub-regional offices and partners on implementation of these initiatives. The pilot initiatives are identified, formulated and managed by the UNIFEM sub-regional offices that provide regular reports to the Programme Manager. Some of the sub-regional offices have an officer dedicated to implementing the Gender Budget initiatives with partners, whereas others have an officer handling it as part of a larger portfolio of projects. This does seem to impact on the quality and frequency of the interactions between the sub-regional offices and the Programme Manager as well as on the progress of the initiatives themselves.

In this first phase of the programme, several management tools have been developed including implementation plans, regular reporting, and an internal review process carried out by UNIFEM twice a year. Furthermore, progress reports are submitted every 6 months to the programme donor. Building on the programme logframe, the programme has developed a results tracking framework by progressively introducing relevant benchmarks and indicators to measure outcomes and programme impact. The framework has been shared with all field offices and the programme logframe has been revised based on feedback to reflect more accurately the expected outcomes and results. The aim was to provide a tool that can be applied at the country level for tracking results in



a uniform manner. However, the actual use of the framework by the pilot projects is uneven and further internal advocacy and capacity building is required to ensure that the programme performance is being monitored and reported in a comparable way to be able to draw out lessons.

One of the management challenges relates to ensuring the technical capacity of the programme officers in the sub-regions. The GRB Programme has identified some very committed programme officers, most of whom have strong knowledge and skills on gender but were not necessarily experts on economic policy making and budgeting processes. They have done an exemplary job managing and monitoring the programme pilots in their countries/regions and moving the work forward, but the programme officers could benefit from expert support and more information exchange with other pilots to strengthen their understanding of macroeconomics and the global economic policy environment.

In terms of the ability of the programme to learn and adjust with changes in external and internal situations, the GRB Programme has appropriately evolved since it was launched in 2001, strengthening its focus on macroeconomic policy instruments such as PRSPs and budgetary reform initiatives which were not clearly outlined in the original programme design. This demonstrates the programme management's ability to continuously scan and respond to strategic opportunities, and learn from experiences in the programme.

IV. CONCLUSIONS, RECOMMENDATIONS AND NEXT STEPS

The review found that the GRBP is comprehensive and innovative with multiple components (research, capacity building, policy advocacy, knowledge network, etc.), unique strategies, approaches and tools. The first phase of the programme has established a strong infrastructure with strong partnerships, and clearly identified objectives and activities. The actual outputs are slowly emerging although more will come to fruition in the second phase along with actual impact/outcomes.

Based on the first phase of the GRB Programme it is possible to say that the areas emerging for substantial consolidation of knowledge include:

- ?? Gender, poverty and participation in the context of fiscal decentralization
- ?? HIV/AIDS, gender and resource allocations
- ?? Domestic violence and gender budget analysis

More specifically, the analysis pointed to the following key findings:

Innovative strategies are emerging from a number of pilots on developing research and capacity building tools, coalition building, identification of sectors/issues in the first phase of the GRB Programme.

Programme partners noted gaps in the gender budget analysis tools and methodologies that existed at the start of the programme. Therefore the programme has enabled them to develop their own tools and methodologies for gender analysis of budgets building on existing tools. These tools include: Mapping of budget process; Differentiation of local budget analysis from national budget analysis; Methodology for gender budget analysis of multi-sectoral issues such as domestic violence; Gender budget analysis integrated into the stages of the budget process; Gender budget analysis methods building on pro-poor and participatory budgeting; Developing indicators to enable monitoring of relevant data; Beginning to apply gender budgets as a monitoring tool for MDGs, PRSPs, and CEDAW among others; Exploring links between MTEF, performance budgeting and gender budgeting; and Developing the building blocks of gender revenue analysis.



Effective use of research findings in advocacy is taking place to varied extents. Policy advocacy is successful in LAC and East Africa, whereas in South Asia and Anglophone West Africa few clear results can yet be reported. The strategies from LAC would be important learning for the other regions. While West Africa is emerging with sound research, the advocacy connection is not engrained in the initiative.

Global studies commissioned by the Programme have played an important role in bridging the emerging lessons from the pilots with key policy issues CEDAW, MTEF, performance budgeting, revenues, etc. There is a need for more consolidated papers of such reflective nature building on the learning from the Programme experiences on the ground. These papers also bring expanded visibility to the learning and the added value of the Programme.

Gender implications of revenue policies are emerging as an area of interest for women's groups, researchers. While most of the existing work on gender implications of tax policies is focused on income taxes in OECD countries, some research around value added taxes and user fees have also been conducted in developing countries. Increasingly, the GRB Programme country initiatives also are tackling taxation policies but still not enough attention is paid.

Recommendations:

Findings indicate that a “second phase” to the GRB Programme is a *sine qua non* in order to organize, crystallize, and consolidate the experiences from the first phase. In addition, a next phase can provide the opportunity to go further in areas of promise emerging from the first phase to establish stronger examples of good practices and success. The evaluation findings suggest that the following areas need to be targeted more intensely and for which resources will need to be mobilized.

Strengthened partnerships for sustained initiatives: UNIFEM's contribution to the GRB process has been to open spaces of greater effectiveness and partnership between civil society and the state. Nevertheless, opening spaces is only the beginning of a complex and elusive process, because what is achieved in a moment can vanish due to a change in authorities or government. One way of achieving sustainability of the initiatives is to ensure ownership of the initiative by partners from an early stage. UNIFEM and its partners can benefit also from building alliances with pro-poor and participatory budget groups. These groups work in their own informal decentralized networks regionally and globally. They have also developed tools and experiences that can bring a unique contribution to the work on applied gender budget analysis and advocacy. Such alliances would have the added value of: mainstreaming gender in pro-poor budget analysis; building joint strategies around engaging/influencing the PRSP process; learning from each other's successful strategies, tools and techniques for research/analysis as well as training/capacity building and dissemination and advocacy.

Diversifying levels of advocacy for policy change: There is more room to develop the engagement of GRB pilots in the various stages of the budget process. So far the analysis with partners has mostly been ex-post facto, taking place somewhere between the auditing and budget formulation phases of the cycle. This analysis can and does feed into policy design and budget drafting phases. Yet it is important to engage with the budget actors during the budget formulation, as well as the enactment and execution stages. More engagement in the budget formulation stage requires closer work with Central Ministries (Ministry of Finance, Planning) and sectoral ministries' budget and planning departments. The gender budget groups need to provide assistance to these ministries in terms of specific guidelines, checklists, and analysis tips towards integrating gender into budget drafting/planning stages.

Connecting the initiatives regionally: While most of the resources in the first phase of the GRB Programme went to country level work, for the future there is value in allocating more resources for strengthening exchange and collaborative work at the regional level. Linking the country level



initiatives regionally will ensure transfer of learning, sharing of resources and expertise and collaborative setting of a regional agenda and target for advocacy. Therefore, the country level initiatives should be reviewed to explicitly include a regional focus to them supporting the emerging regional networks on gender budgets.

Documenting and sharing innovation for learning and visibility of the issue: Programme partners have come up with tools and methods that are innovative in moving the field of gender budgeting work forward. The extensive approaches such as working at the local level, working with parliamentarians, or on multi-sectoral issues present very unique lessons and require thorough documentation and dissemination. The consolidation of these innovations in a systematic manner for use by wider audiences will result in the much needed paradigm shift in the gender budgeting field. For the initiatives to be sustainable through support by other donors, stakeholders and budget actors, they also need to have increased visibility. The consolidation of the materials, including the standardization of various training tools and materials developed, will also help toward increasing the visibility of the programme with the external world, as well as increase learning and exposure between different programme pilots and activities. The recently updated Gender Budgets Initiative website built in collaboration with IDRC and the Commonwealth Secretariat would be an ideal space to showcase the tools, materials and experiences.

Supporting capacity building and training for specialized gender budget analysis: The first phase of the programme has been successful in creating a national constituency that has a general understanding of what gender budgeting is and can engage in budget research, training and advocacy. This along with the investment of the program of capacity building on gender and economics literacy in Latin America and West Africa has contributed to expanding the pool of practitioners who can engage in gender budget analysis. The second phase needs to invest further in building capacity and standardized tools for more specialized application of gender budget analysis at different levels (national, local), in different sectors, as well as for different target groups (national, local, parliament, fiscal policy makers, budget actors, women activists, sector specialists).

Next Steps

Some concrete next steps for the UNIFEM GRB Programme second phase activities include the following.

Establishing National Advisory Groups: The pilots would benefit from forming a national advisory groups that include key budget stakeholders (Ministry of Finance, National Planning Commission, National Statistics Office, Budget Analysts/Researchers, Ministry of Women's Affairs, Budget Advocacy Groups/NGOs, and Women's NGOs, etc. as members). The role of the Groups would be to guide the initiatives to ensure national ownership, synergy with key budget and policy-making initiatives, and sustainability.

Supporting issue based initiatives: Gender budget tools are being tested in multiplicity of areas including HIV/AIDS, unpaid care work, access to services and resources, sex disaggregated impact of revenue raising measures, gender budgeting in post-conflict settings and violence against women. Many of these require multi-sectoral tools and specialized methodologies for analysis (e.g. domestic violence), and carry time sensitive urgent response requirements (e.g. HIV/AIDS, post-conflict).

Consolidating and sharing learning: Several steps will be taken to systematically document and share learnings emerging from the Programme so far. In the early stages of the second phase, at least four synthesis papers will be prepared on lessons learned and good practices from the first phase of the programme. These will be made available in multiple languages. A workshop of GRB Programme staff and partner agencies will also be organized for cross-regional learning and to strengthen networking between the various initiatives supported by the programme. This face-to-face networking and sharing will be re-enforced by the internal electronic community of practice



that was established in mid-2003. The knowledge and learning emerging from the programme will also be shared through the revamped interactive gender budgets website.



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UNDP www.undp.org/poverty/

UNIFEM www.unifem.org



ANNEX 1 TERMS OF REFERENCE

PROGRAMME MID TERM REVIEW

“STRENGTHENING ECONOMIC GOVERNANCE: APPLIED GENDER ANALYSIS TO GOVERNMENT BUDGETS”

Overview:

In 2001, UNIFEM launched the programme “Strengthening Economic Governance: Applied Gender Analysis to Government Budgets” with financial contribution from the Government of Belgium and UNIFEM. The work on gender budgets is a tool towards achieving gender equality and equitable development outcomes for the poor and marginalized groups. Currently, the programme is supporting initiatives in twenty countries worldwide. These include: **India, Nepal, Brazil, Chile, Kenya, Peru, Ecuador, Bolivia, the Philippines, Nigeria, Tanzania, Uganda, Sri Lanka, Pakistan, Morocco, Egypt, Mexico, Belize, Senegal and Mozambique.**

UNIFEM's programme supports activities at global, regional, national and local levels to achieve gender equality and poverty eradication through research and capacity building, policy advocacy, networking and knowledge sharing. Globally, the programme supports the development of tools for applied gender analysis of expenditures and revenues for adaptation and utilization at country level. It promotes women's participation in economic fora and economic governance bodies, and advocates debate among international institutions on gender and economic challenges.

The country level initiatives for gender responsive budgeting include the examination and analysis of local budgets, national budgets and sectoral budgets from a gender perspective and study of the gender-differentiated impact of taxation policies and revenue-raising measures. These efforts seek to promote dialogue among civil society, parliamentarians and officials responsible for budget policy formulation and implementation around gender equality, poverty and human development goals.

Within such a large and diverse programme, ongoing monitoring and evaluation is extremely important to identify strengths and weaknesses, align methodology with result, and assess the tools and capacity building strategies in use. The monitoring activities enable UNIFEM to track results in terms of achieving the anticipated goals as well as indicate progress achieved in the implementation of the programme. The programme benefits from a baseline study carried out at the time of launching the programme by Debbie Buddlender that is included in the publication *Gender Budgets Make Cents*.

A mid-term evaluation is to be undertaken by August 2003. The purpose is:

- ?? To assess methodologies and strategies adopted in terms of effectiveness in achieving results focusing on reducing feminized poverty
- ?? To identify adjustments needed in the programme to align activities with planned results
- ?? To undertake an in-depth analysis of selected experiences in order to enhance learning amongst and between project participants and others interested in gender budget analysis.
- ?? To provide guidelines and directions for ensuring that this programme contributes to reducing feminized poverty and linking with existing poverty reduction strategy initiatives.

Methodology and Terms of Reference:

An evaluation team will be recruited by UNIFEM to carry out this mid term review. The team will consist of a lead evaluation consultant and an evaluation consultant for the Latin America Region.



The team will develop a plan for implementing this review and will be guided by the questions in the following section.

The lead evaluation consultant will work in collaboration with the Consultant for the Latin America Region to carry out this task under the guidance of UNIFEM's Senior Economic Advisor and in close consultation with UNIFEM's Gender Budgets Programme Specialist. More specifically, the lead consultant will be responsible for the following tasks:

- ?? Carry out desk review of relevant documents and reports
- ?? Design a process to evaluate the programme based on consultation with key stakeholders including UNIFEM staff, partners and donors
- ?? Identify three countries for field visits
- ?? Prepare questionnaire and necessary tools for carrying out the review
- ?? Carry out field visits in Asia and Africa
- ?? Review and incorporate the report of the LAC consultant
- ?? Draft evaluation report and discuss with UNIFEM
- ?? Finalize report based on feedback.

Expected Outputs:

The expected outputs of this review include:

- ?? Country specific analysis of the process and progress towards achieving key results.
- ?? A mid term review report that addresses the following key questions:
 - **Purpose:** How effective is the programme in demonstrating impact of macroeconomic policies on addressing gender inequality and poverty?
 - **Strategies:** The programme is supporting gender budgets initiatives following different approaches i.e. focusing on the national level, the local level, or sectoral levels, analyzing expenditures and/or revenues. What approaches have proved more effective at different levels and why?
 - **Tools:** A general assessment of tools developed for analyzing expenditures, revenues and budget processes. How useful and effective are the tools developed so far?
 - **Partnerships:** What types of partnerships yielded the greatest benefits towards achieving the projected results? What other partnerships are needed?
 - **Management:** How effective has the management of the programme been, especially with respect to monitoring and ensuring sustainability and successful results?
 - Recommendations to the programme in terms of ensuring future sustainability and knowledge sharing

Proposed Dates and duration:

Starting on 1 July 2003 for a 50 working day period extending over two months as per the following breakdown

TASK	Lead consultant	LAC consultant
Consultation with NY	5	4
Carry out desk review	10	4
Design process to evaluate and identify countries	3	1
Prepare questionnaire and tools	2	1
Carry out field visits	3 countries @ 5 days each	3 countries @ 5 days each



	15 days	15 days
Report writing	15	9
total	50	35

Scope:

The consultant will examine the programme’s performance by focusing on a select number of countries (three countries) as well as the global activities and programme management. The countries are to be selected from the initiatives that have started earlier in the programme. These include: India, Nepal, Kenya, Bolivia, Nigeria, Ecuador, Peru, Tanzania, Uganda, Mexico and Brazil.

Implementation Plan:

IMPLEMENTATION ARRANGEMENTS	WHO	
Coordination of process	Programme Manager	February – April 2003
Identify evaluation consultant	UNIFEM consultant	End of May 2003
Defining methodology (country questionnaires, focus group guidelines, and global framework), desk review, country selection		July
Organization of focus groups at country level	UNIFEM field offices	July
Carry out country visits	Consultant	July – August
Consolidate report	Consultant	August
Review report and discuss findings New York workshop	UNIFEM, partners, donor,	August 2003

* Key advisors to the process include Diane Elson (consultant to the programme), Yassine Fall, (UNIFEM) Joanne Sandler, (UNIFEM) Shoko Ishikawa (UNIFEM), UNIFEM Field offices and bilateral partners, and stakeholders at national and regional level.

Qualification

- ≈≈ 7-10 years experience in planning and conducting evaluations in developing countries
- ≈≈ Experience in conducting evaluations from a gender perspective and thematic/sector evaluations that cover multiple geographic regions.
- ≈≈ Strong familiarity with economic policy and gender equality initiatives
- ≈≈ Fluency in English and at a minimum an understanding of Spanish.