



Manual for Training on Gender Responsive Budgeting

Prepared by Katrin Schneider on behalf of GTZ

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Table of contents

Introduction2

Module 1: Basic Concepts : What does gender mean? – What is a budget?9

Module 2: Gender Responsive Budgeting – An introduction.....31

Module 3: Gender Responsive Budgeting Initiatives – Good practices and lessons learnt ..44

Module 4: Different stakeholders and steps of implementation.....53

Module 5: Sex-disaggregated statistics, time use data and gender indicators.....63

Module 6: Gender Responsive Budgeting Tools – An overview77

Module 7: Gender Aware Policy Appraisal.....85

Module 8: Sex-disaggregated Public Expenditure Incidence Analysis.....107

Module 9: Gender Aware Beneficiary Assessment.....117

Module 10: Gender-Sensitive Public Expenditure Tracking Surveys125

Module 11: Sex-disaggregated Analysis of the Impact of the Budget on Time Use.....131

Module 12: Engendering Social Accounting Matrices139

Module 13: Lobbying and Advocacy Strategies164

Additional material

I. Bibliography172

II. Examples: Programmes for trainings of different lengths.....180

III. Example of a training needs assessment186

IV. Example of an evaluation sheet189

Introduction

Since the Fourth World Conference of Women held in 1995 in Beijing, gender mainstreaming has become an internationally acknowledged strategy for promoting gender equality. Gender responsive budgeting aims at mainstreaming gender into public finance. The Beijing Platform for Action explicitly refers to the “integration of a gender perspective in budgetary decisions on policies and programmes, as well as the adequate financing of specific programmes for securing equality between women and men”. In the Beijing Plus 5 document, it was reiterated that

Limited resources at the state level makes it imperative that innovative approaches to the allocation of existing resources be employed, not only by governments but also by non-governmental organizations and the private sector. One such innovation is the gender analysis of public budgets, which is emerging as an important tool for determining the different impact of expenditures on women and men to help ensure the equitable use of existing resources. This analysis is crucial to promote gender equality.¹

Over the last ten years, more than 60 gender responsive budgeting initiatives (GRBI) have been founded worldwide, and their number is still growing. Though diverse in their objectives, scope and range of activities, they do share a common theme: capacity building.

In several countries, gender budgeting initiatives are closely linked to Poverty Reduction Strategy (PRS) processes.

The Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ) GmbH has right from the start been promoting gender responsive budgeting as a tool to monitor the implementation of PRS. Gender responsive budgeting was one of the topics discussed in connection with PRS processes during two workshops financed by the German Federal Ministry for Economic Cooperation and Development (BMZ) and organised by GTZ: the Gender Working Group at the conference entitled “Beyond the Review: Sustainable Poverty Alleviation and PRSP”, held in Berlin in May 2002; and in the Regional Workshop on “Engendering PRSPs in Africa”, held in Nairobi in December 2003. The main stakeholders identified insufficient knowledge concerning how to apply tools and gender responsive budgeting methods as being one of the key bottlenecks impeding successful lobbying for and implementation of a gender mainstreaming strategy in public finance. To meet the demand for improved skills in gender responsive budgeting and to build up a pool of trainers in different countries, GTZ’s Gender Advisory Project contracted the author of this manual to carry out an advanced two-week training course for trainers, which took place from 26 July to 7 August 2004 in Nairobi. It was attended by government officials, parliamentarians,

¹ Resolution adopted by the General Assembly: Further actions and initiatives to implement the Beijing Declaration and Platform for Action, S 23/3, 16 November 2000, paragraph 36.

gender experts, members of non-governmental organizations (NGOs) and researchers from Kenya, Uganda and Cameroon. This manual is based on the advanced training course. It has been designed for professional gender trainers who are familiar with training methods and gender concepts.

How to use this manual

The manual is structured like a modular system: The trainer can choose topics and exercises according to the target group and the length of the training. The manual consists of the following modules:

- Module 1: Basic concepts: What does gender mean? – What is a budget?
- Module 2: Gender responsive budgeting – An introduction
- Module 3: Gender responsive budgeting initiatives – Good practices and lessons learnt
- Module 4: Different stakeholders and steps of implementation
- Module 5: Sex-disaggregated statistics, time use data and gender indicators
- Module 6: Gender responsive budgeting tools – An overview
- Module 7: Gender aware policy appraisal
- Module 8: Sex-disaggregated public expenditure incidence analysis
- Module 9: Gender aware beneficiary assessment
- Module 10: Gender sensitive public expenditure tracking surveys
- Module 11: Sex-disaggregated analysis of the impact of the budget on time use
- Module 12: Engendering social accounting matrices
- Module 13: Lobbying and advocacy strategies

Each module contains:

- ☞ Background information for the trainer with references for further readings
- ☞ A session guide with guidelines for the trainer clarifying learning objectives of the module and how to carry out the exercises
- ☞ Handouts for distribution
- ☞ Exercises for distribution

At the end of the manual you find additional material such as a bibliography, examples of programmes for trainings of different lengths, an example of a training needs assessment, and an example of an evaluation sheet.

Last, but not least: We would like to constantly update this manual. Therefore we would highly appreciate your feedback. Any comments, e.g. about your experience with using this manual, the usefulness of the different modules, handouts and exercises, information you missed etc. should be sent to the author, Ms. Katrin Schneider (kat.schneider@gmx.net).

Before you start training: How to design a sound training course on gender responsive budgeting

A variety of different actors and stakeholders can be involved in gender responsive budgeting, e.g.

- €# The Ministry/Department of Finance
- €# Sector or line ministries/departments
- €# The Ministry of Women's Affairs/Gender
- €# Parliamentarians
- €# Researchers and academics
- €# Statisticians
- €# Civil society organisations
- €# Women's groups
- €# Media
- €# Donors.

All these carry out different activities, which result in different training needs with regard to their different roles in the implementation of gender responsive budgeting. To make your gender responsive budgeting training as successful as possible, you may take the following 11 steps into consideration.

1. Definition of the target group

You must first define your target group. A training course designed for members of a women's activist group who are not familiar with the budgetary process and budget documents would have to contain other topics than a training course aimed at government officials working in the budget department of a line ministry, who may conversely have never heard of basic gender concepts or gender analysis tools. If previous knowledge of potential target groups suggests they are too diverse, it is advisable not to bring them together in one training course, as you may need to cover too many different topics in detail, which may be boring for some participants. However, in some cases, a training course may provide a platform for an exchange of knowledge, e.g. between gender experts and public finance specialists in your country, and you may want to act more as a facilitator of this knowledge-sharing process than as a trainer. You should also take into consideration the sex, age and social hierarchies of participants. Some people may, for example, feel too inhibited in the presence of their superiors to participate actively or contribute effectively to the training.

2. Training needs assessment

Having decided on the target group, you must decide what potential participants in your training course *need to know*, and then find out what *they already know*. What they should know is largely dependent on their role in the gender responsive budgeting process. A research institute that is specialized in public finance will be familiar with public finance tools, but not necessarily with gender concepts. If they are to conduct research for a GRBI, then they have to learn how to incorporate sex-disaggregated statistics or time-use data into their tools. You may carry out a small-scale training needs assessment in order to obtain information about the level of knowledge and skills, either by interviewing some key persons, or sending out a short questionnaire to participants in your training target group.

3. Definition of the objectives of the training

Based on the training needs assessment, you need to define the objectives of the training. A training course may aim at sensitization and awareness-raising if the concept of gender responsive budgeting is completely new to participants. If participants already have some sound knowledge of gender responsive budgeting concepts and tools, then the objective of the training may be to enable participants to carry out gender responsive budgeting analysis or to apply some of the tools that are appropriate for their purposes.

4. Choosing the length and timing of the training

Depending on the target group and the objectives of the training, you must decide on the length and timing of the training course. Every country's planning and budget cycle follows a certain calendar. For obvious reasons, it is not a good idea to plan a training course just a few days before the budget goes before parliament.

5. Choose the location where the training will take place

The choice of the training location may have an impact on its success. It may be easier for people to participate regularly and to concentrate on the course content if they cannot go back to their offices. If all participants stay in one place overnight, you can additionally arrange evening discussions, material for self-study or film sessions. You should not underestimate the importance of the setting in making participants feel comfortable, and in ensuring that your course is an event that they will remember.

6. Choosing relevant topics to be covered

The choice of topics to be covered largely depends on the result of the training needs assessment, the objectives of the course and its intended length. Do not try to put too many topics into one training course or session. Participants need to have sufficient time to discuss topics and to work on exercises. If you want to cover topics that you are not very familiar with, e.g. the budgetary process or the budget documents in your country, you may consider inviting an expert for a specified session or to work closely with a co-facilitator whose knowledge complements yours.

7. Defining the sequential order

When you draft the programme of your training, you must think of the sequential order of the topics you want to cover. The sessions should be coordinated, and you may need to lay out a sound basis for some sessions. If you want to discuss, for example, the possibility of incorporating gender into macroeconomic models, you should plan a session on time-use data collection and valuation before the macroeconomic modelling session.

8. Choosing the training methods and media to be used

You should try to use as many of the following training methods as the length of the training course allows:

- Lectures by the trainer (using PowerPoint presentations, overhead projectors, etc.)
- Background reading material
- Group discussion
- Exercises
- Case studies
- Role-plays
- Buzz groups (usually small groups consisting of three to six people who are given an assignment to complete in a short time period)
- Presentations by participants
- Films
- Calculation exercises.

These different methods are useful for a variety of reasons. Group discussions, for instance, allow a common understanding of certain topics to develop, whereas lectures and background reading are appropriate means of conveying knowledge. Exercises, case studies and role-plays involve participants as actors and allow them to apply their newly gained knowledge, although they are more time-consuming.

However, even for a one-day training course, you should prepare one or two exercises to keep participants interested throughout the training session.

9. Designing exercises

This manual provides a number of different exercises that you may want to use in your training course on gender responsive budgeting. However, these exercises are merely intended as suggestions: you may choose to change them slightly to adapt them to your own purposes, or indeed to create your own, completely new exercises.

10. Prepare handouts and background reading materials

You will also find handouts in the manual that you can copy and distribute in the course of your training. You may want to consult in addition some other useful manuals on gender responsive budgeting and case studies for different countries, which are available on several websites. At the end of this manual you will find a list of additional reading material and useful websites.

11. Evaluation

At the end of every training course, you should ask participants to evaluate the training. The evaluation method can vary according to the length of the training course. If you have delivered a very short training course (e.g. one day), you could ask participants to take two coloured cards and to write down on one “what I have learnt today”, and on the other “what I felt was missing today”. After a longer training course, you may find it more useful to distribute a questionnaire that has to be filled in by participants. This allows participants to make a more detailed evaluation of the training. You should always analyse the results of such questionnaires carefully and take on board any useful comments. There is always scope for improvement in your next training course!

MODULE 1

BASIC CONCEPTS

WHAT DOES GENDER MEAN?

WHAT IS A BUDGET?



Module 1: Basic Concepts : What does gender mean?

What is a budget?

Objective	To create a common understanding of the meaning of <i>gender</i> and <i>budgeting</i> . To introduce some basic gender concepts and gender analysis tools. To familiarise participants with how to read a budget.
Duration	150 minutes
Methods	Lecture PowerPoint presentation Group work
Training aids	Multimedia projector Overhead projector Flip chart ZOPP ² cards
Handouts	Glossary of gender and development Women in development (WID)/Gender and development (GAD) policy matrix Gender mainstreaming Equality of outcome Gender analysis Line item budget Programme-oriented budget
Exercise	The participants introduce themselves Prioritisation of state expenditures (1) Prioritisation of state expenditures (2) Prioritisation of private household expenditures Gendered roles of women and men

² German acronym for “objective-oriented planning tool”, developed by GTZ.

Background information:

Sex and gender

All people are born as a woman or a man. The term *sex* refers to biological differences between females and males. For the vast majority of people the biological sex does not change over time. The term *gender* refers to the different social roles, responsibilities and identities of women and men and the power relations between women and men in a given society. Gender roles and relations differ across countries and cultures, and may even differ among different groups in one society. Gender roles and relations are not static, but subject to change.

Budgets are not gender-neutral but gender-blind

Budgets are among the most important policy tools available to a government. On the one hand they influence the overall level of income and employment of a country, and on the other they reflect its political priorities. Although the numbers and figures compiled in the budget documents may appear gender-neutral, empirical findings show that expenditure patterns and the way a government raises revenue have a different impact on women and girls as compared to men and boys, often to the detriment of the former. This is due to the socially determined roles that women and men play in society, the gendered division of labour, different responsibilities and capabilities, and the different constraints that women and men face, all of which normally leaves women in an unequal position in relation to the men in their community, with less economic, social and political power.

Types of budgeting systems

Budgets can be presented in different ways. Some countries follow a *line item* budgeting system that provides information about the amount of money (inputs) spent on different items such as salaries, operation and maintenance, allowances, etc., as well as on different ministries/agencies, but not about the activities, outputs and outcomes funded by the budget.

In recent years, many countries have started to introduce some form of *programme-oriented* or *performance-based* budgeting. Performance budgeting links inputs (the amount of money spent) with results (outputs and outcomes) and, thus, allows for the monitoring of the achievement of set goals and targets. Performance budgeting facilitates to link strategic planning more closely with medium-term and annual budgeting and performance management.

Further Readings:

- ✎ Alexander, P. with S. Baden: Glossary on Macroeconomics from a Gender Perspective, 2000. www.bridge.ids.ac.uk/reports/re48c.pdf
- ✎ DAC Source book on concepts and approaches linked to gender equality, Paris, 1998. www.oecd.org/dataoecd/4/16/31572047.pdf
- ✎ PRSP Sourcebook Chapter 6: Public spending.

Session guide:

1. Ask participants to introduce themselves. If you carry out a longer training session, it is especially important that people feel comfortable, so a good working atmosphere needs to be created. In the exercise section of this module, you will find an exercise sheet that you may use. You can adapt the exercise in many ways. You may add additional questions that seem useful to you. You may also prefer to ask participants to present themselves rather than forming pairs. Instead of the “secret wish” question, which has in the past often proven to be a good icebreaker, you could alternatively ask the following: “If you were the president of your country, what would you change first to improve the situation of women in your country (if you are a woman) or of men in your country (if you are a man)?” Participants should briefly explain why this would be their first action. Such questions provide a good starting point for a discussion of gender issues in a country.
2. Very often, people incorrectly define *gender* as being a problem related only to women. Therefore, you need to introduce the concept of gender at the beginning of your training, and should make it clear that *gender* concerns women and men alike. How detailed you explain gender concepts and gender analysis tools largely depends on participants’ background knowledge.
3. Experience has shown that it is useful to introduce gender concepts related to public finance from the very beginning. Adults learn best if they can link new approaches and tools to their daily work and experiences.
4. You may use the prioritisation exercise as a starter. Form same-sex working groups and ask them to follow the instructions on the exercise handout. The prioritisation exercise should be tailored to the target group. If you are training budget officials, for example, you can use your country’s budget classification headings. Alternatively, if you are training other target groups, you may want to choose less complex terms, as not everyone might be familiar with the budget classification headings. If you train illiterate people, you may want to use a sample private household budget for this exercise and explain that the principles of public budgeting – though more complicated and complex – are not much different from those of private households.
5. Discuss the results of the exercise in the group and ask for explanations where priorities vary. Emphasise that budgeting is about the prioritisation of limited resources. Introduce the different dimensions that are relevant to budgets from a gender perspective (public employment, users of publicly funded services, transfer payments, decision-making, time use, targeted policies).
6. Emphasise that due to the social roles that women and men perform in certain social and cultural contexts, their priorities with regard to public spending most

likely differ, and that this is one of the reasons why we should look at the budget from a gender perspective.

7. Distribute the “Glossary of gender and development” handout, and explain the terms included in the table.
8. Give a historical overview of the development from WID to GAD, and distribute the related handout. Ask participants what they think is the predominant approach adopted in their country. Allow for group discussion.
9. Distribute the handout on gender mainstreaming, and explain that this has become the internationally accepted strategy to achieve gender equality. Refer to the Beijing Platform for Action, and explain that gender mainstreaming encompasses two complementary approaches. Point out that gender responsive budgeting refers to gender mainstreaming in public finance.
10. Use the “Story of the Fox and the Crane” to illustrate the need for equality of outcome.
11. Explain the main concepts and analytical tools of gender analysis.
12. Explain that the budget is one of the most important policy tools of a government, given that revenue-raising and expenditure patterns reflect political priorities. Explain the different economic and social functions of a budget, such as the allocation of resources, measures to stimulate employment, income and growth, price stabilisation, the provision of basic social services, and the redistribution of income and wealth.
13. Emphasise that the size of the budget is also determined by other macroeconomic policy decisions such as monetary policy and exchange rate and trade policies, and that the scope of changes to priorities may be limited due to legal obligations, e.g. debt repayments. Emphasise that through the Highly Indebted Poor Countries (HIPC) initiative, debt repayment obligations have been reduced and monies should be spent in favour of the poor and poor women, especially.
14. Introduce different ways of presenting a budget (line item budgeting, programme-oriented budgeting). Ask participants if they are aware of what budget system is followed in their own country.
15. Explain the difference that inputs, activities, outputs, outcomes and impact can make. Ask participants how these terms could be linked to the budget system in their country.
16. At the end of the session, ask participants to form working groups and to carry out the “gendered roles of women and men” exercise. Group presentations in the plenary can be written on flipchart paper or ZOPP cards.



Handout: Glossary of gender and development

<i>Affirmative (positive) action</i>	Measures targeted at a particular group and intended to eliminate and prevent discrimination or to offset disadvantages arising from existing attitudes, behaviours and structures (sometimes referred to as positive discrimination). (European Commission, 1998)
<i>Care economy</i>	The part of human activity, both material and social, that is concerned with the process of caring for the present and future labour force, and the human population as a whole, including the domestic provision of food, clothing and shelter. Social reproduction is the provisioning of all such needs throughout the economy, whether part of the paid or unpaid components. (Alexander, P., Baden, S., 2002)
<i>Decision-making</i>	A key aspect in changing gender relations at individual, household, group, village, and societal levels. (ILO, 2002)
<i>Division of labour (by sex)</i>	The division of paid and unpaid work between women and men in private and public sphere. (European Commission, 1998)
<i>Empowerment</i>	The process of gaining access and developing one's capacities with a view to participating actively in shaping one's own life and that of one's community in economic, social and political terms. (European Commission, 1998)
<i>Equal opportunities for women and men</i>	The absence of barriers to economic, political and social participation on the ground of sex. (European Commission, 1998)
<i>Gender</i>	A concept that refers to the social differences between women and men that have been learned, are changeable over time and have wide variations both within and between cultures. (European Commission, 1998)
<i>Gender analysis</i>	The study of differences in the conditions, needs, participation rates, access to resources and development, control of assets, decision-making powers, etc. between women and men and their assigned gender roles. (European Commission, 1998)
<i>Gender audit</i>	The analysis and evaluation of policies, programmes and institutions in terms of how they apply gender-related criteria. (European Commission, 1998)

<i>Gender blind</i>	Ignoring/failing to address the gender dimension (as opposed to gender sensitive or gender neutral). (European Commission, 1998)
<i>Gender equality</i>	The concept meaning that all human beings are free to develop their personal abilities and make choices without the limitations set by strict gender roles; that the different behaviour, aspirations and needs of women and men are considered, valued and favoured equally. (European Commission, 1998)
<i>Gender equity</i>	Fairness in women's and men's access to socio-economic resources [...]. A condition in which women and men participate as equals and have equal access to socio-economic resources. (European Commission, 1998)
<i>Gender gap</i>	The gap in any area between women and men in terms of their levels of participation, access, rights, remuneration or benefits. (European Commission, 1998)
<i>Gender impact assessment</i>	Examining policy proposals to see whether they will affect women and men differently, with a view to adapting these proposals to make sure that discriminatory effects are neutralised and that gender equality is promoted. (European Commission, 2001).

<i>Gender needs</i>	The roles of men and women in existing societies and institutions are generally different. Thus, their needs vary accordingly. Two types of needs are usually identified: <i>Practical needs</i> arise from the actual conditions which women and men experience because of the gender roles assigned to them in society. They are often related to women as mothers, homemakers and providers of basic needs, and are concerned with inadequacies in living and working conditions, such as food, water, shelter, income, health care and employment. For women and men in the lower socio-economic strata, these needs are often linked to survival strategies. Addressing them alone only perpetuates the factors which keep women in a disadvantaged position in their societies. It does not promote gender equality. <i>Strategic needs</i> are the needs required to overcome the subordinate position of women to men in society, and relate to the empowerment of women. They vary according to the particular social, economic and political context in which they are formulated. Usually they concern equality issues such as enabling women to have equal access to job opportunities and training, equal pay for work of equal value, rights to land and other capital assets, prevention of sexual harassment at work and domestic violence, and freedom of choice over childbearing. Addressing them entails a slow transformation of the traditional customs and conventions of a society. (ILO, 2000b)
<i>Gender neutral</i>	Having no differential positive or negative impact for gender relations or equality between women and men. (European Commission, 1998)
<i>Gender planning</i>	An active approach to planning which takes gender as a key variable or criteria and which seeks to integrate an explicit gender dimension into policies or action. (European Commission, 2001)
<i>Gender relations</i>	The relations and unequal power distribution between women and men which characterise any specific gender system. (European Commission, 1998)
<i>Gender sensitive</i>	Addressing and taking into account the gender dimension. (European Commission, 1998)

<i>Human development</i>	Human development is about people, about expanding their choices to lead lives they value. Economic growth, increased international trade and investment, technological advance – all are very important. But they are means, not ends. Whether they contribute to human development in the 21 st century will depend on whether they expand people's choices, whether they help create an environment for people to develop their full potential and lead productive, creative lives. (UNDP, 2002)
<i>Human rights of women</i>	The rights of women and the girl child are inalienable, integral and indivisible part of universal human rights. (European Commission, 1998)
<i>Occupational (job) segregation</i>	The concentration of women and men in different types and levels of activity and employment, with women being confined to a narrower range of occupations (horizontal segregation) than men, and to the lower grades of work (vertical segregation). (European Commission, 1998)
<i>Reproductive rights</i>	The right of any individual or couple to decide freely and responsibly the number, spacing and timing of their children and to have the information and means to do so, and the right to attain the highest standard of sexual and reproductive health. (European Commission, 1998)
<i>Sex</i>	The biological characteristics which distinguish human beings as female or male. (European Commission, 1998)
<i>Sex-disaggregated statistics</i>	The collection and separation of data and statistical information by sex to enable comparative analysis, sometimes referred to as gender disaggregated statistics. (European Commission, 1998)
<i>Women's triple role</i>	Women's triple role refers to the reproductive, productive and community managing role. The way these forms are valued affects the way women and men set priorities in planning programs or projects. The taking or not taking into consideration of these forms can make or brake women's chances of taking advantage of development opportunities. (Moser, C.O., 1993)

Source: EC Toolkit on Mainstreaming Gender Equality in EC Development Cooperation, Section 3.



Handout: WID/GAD Policy Matrix

ISSUES	WELFARE	EQUITY	ANTI-POVERTY	EFFICIENCY	EMPOWERMENT
Origins	<p>Earliest approach:</p> <ul style="list-style-type: none"> -residual model of social welfare under colonial administration -modernisation/accelerated growth of the economic development model. 	<p>Original WID approach:</p> <ul style="list-style-type: none"> -failure of modernisation development policy -influence of Boserup and First World feminists on Percy Amendment -declaration of UN Decade for Women. 	<p>Second WID approach:</p> <ul style="list-style-type: none"> -toned down equity because of criticism -linked to economy Redistribution with growth and basic needs. 	<p>3rd and now predominant WID approach:</p> <ul style="list-style-type: none"> -policies of economic stabilisation and adjustment rely on women's economic contribution to development. 	<p>The most recent approach:</p> <ul style="list-style-type: none"> -arose out of the failure of the equity approach -Women's feminist writing and grassroots organisations.
Most Popular Period	1950-70: but still widely used.	1975-86: attempts to adopt it during and after the Women's Decade.	1970s onwards: still limited popularity.	Post-1980s: now the most popular approach.	1975 onwards: accelerated during 1980s, and still has limited popularity.
Purpose	To bring women into development as better mothers: this is seen as their most important role in development.	To gain equity for women in the development process: women seen as active participants in development.	To ensure poor women increase their productivity: women's poverty seen as a problem of underdevelopment, not of subordination.	To measure development more efficiently and more effectively: women's economic participation is seen as being associated with equity.	To empower women through greater self-reliance: women's subordination not only seen as a problem of men, but also of colonial and neo-colonial oppression.
Needs of women met and roles reorganised	To meet PGN* in the reproductive role, relating particularly to food aid, malnutrition and family planning.	To meet SGN** in terms of a triple role: directly through state top-down intervention, providing political and economic autonomy by reducing inequality with men.	To meet PGN in the productive role, to earn an income, particularly in small-scale income-generating projects.	To meet PGN in the context of reducing social services by relying on all three roles of women plus the elasticity of their time.	To meet SGN in terms of a triple role: indirectly through bottom-up mobilisation around PGN as a means of confronting oppression.
Comment	<p>Women are seen as passive beneficiaries of development with a focus on their reproductive role.</p> <p>Non-challenging, and therefore still very popular, especially with governments and traditional NGOs.</p>	In identifying the subordinate position of women in terms of their relationship to men, this is challenging: it has been criticised as a product of Western feminism, is considered threatening, and is unpopular with governments.	Poor women are isolated as a separate category with a tendency only to recognise their productive role; governments are reluctant to give limited aid to women, which means popularity still at small-scale NGO level.	Women seen entirely in terms of their delivery capacity and ability to extend their working day. This is the most popular approach with both governments and multilateral agencies.	Potentially challenging with its emphasis on the Third World and women's self-reliance. Largely unsupported by governments and agencies. Avoidance of Western feminist criticism means slow significant growth of underfinanced voluntary organisations.

* Practical gender needs

** Strategic gender needs



Handout: Gender mainstreaming and the promotion of gender equality

ECOSOC definition of gender mainstreaming:

“Mainstreaming a gender perspective is the process of assessing the implications for women and men of any planned action, including legislation, policies or programmes, in any area and at all levels.

It is a strategy for making women’s as well as men’s concerns and experiences an integral dimension of the design, implementation, monitoring and evaluation of the policies and programmes in all political, economic and societal spheres so that women and men benefit equally, and inequality is not perpetuated.

The ultimate goal is to achieve gender equality.”

E.1997.L.30.Para.4. Adopted by ECOSOC 17.7.97

“The concept of gender equality is based on the different living situation of women and men. The term gender refers to the rights and duties assigned by society to women and men. In contrast to the biologically determined roles of women and men, gender roles are subject to constant change. In most societies women suffer social and economic disadvantages as a result of the prevailing gender roles. With the help of gender analyses these disadvantages are to be identified....The rights and duties of women and men are closely correlated so that men must be included if gender-specific inequalities are to be overcome. The practical conclusion is not that the situation of women should be improved exclusively but that the relationships between women and men should be changed. The present concept provides guidance for taking account of the gender-specific approach throughout all policy fields, planning and decision-making processes (gender mainstreaming).”

Source: Federal Ministry for Economic Co-operation and Development: Concept for the Promotion of Equal Participation by Women and Men in the Development Process, May 2001, p. 6.



Handout: Equality of outcome



The Story of the Fox and the Crane Equal treatment does not mean the same treatment



The Fox invited the Crane to dinner. He served the food on a large flat dish. The Crane with her long, narrow beak could not eat.

The Crane invited the Fox to dinner. She served the food in a deep vase, and so the Fox with his short, wide face could not eat.

Both friends had an equal opportunity for nourishment, but each time one of them could not take advantage of this opportunity.

**The development challenge in every case is to identify barriers to the opportunities that exist, and custom design the adjusted interventions that will
*lead to equality of outcome.***

Source: UNDP: Gender in Development Programme, Learning and Information Pack, Gender Analysis, p. 109.



Handout: Gender analysis

A gender analysis enables us to identify the differences between women and men regarding their specific activities, conditions, needs, access and control over resources, and access to development benefits and decision-making.

Concepts and analytical tools of gender analysis:

Influencing factors	<ul style="list-style-type: none"> # social # economical # political # environmental # legal # cultural, etc.
Gender division of labour/roles	<ul style="list-style-type: none"> # seasonal distribution # time use # workload # reproductive/productive # community management/policies # paid/unpaid
Access to/control over resources	<ul style="list-style-type: none"> # natural # physical # immaterial # human # market # socio-cultural
Decision-making capacity	<ul style="list-style-type: none"> # household level # political level (community and state) # formal and informal community organisations
Gender needs	<ul style="list-style-type: none"> # practical needs # strategic interests
Institutional analysis	<ul style="list-style-type: none"> # policy and services # organisational structure # staff qualifications/personnel
Policy approach	<ul style="list-style-type: none"> # welfare # equity # anti-poverty # efficiency # empowerment
Level of participation	<ul style="list-style-type: none"> # charity # receiving of benefits # contribution of labour # problem consultation # empowerment

Source: Augustin, Ebba: Gender Training Manual, GTZ, Eschborn, 1995.

**Handout: Line item budget**

Head	Item	Title	Approved estimates for 2002/2003 in Kenyan shillings (KShs)	Estimates for 2003/2004 in KShs	Projected estimates in KShs	
					2004/2005	2005/2006
639		District Agricultural Extension Services				
	000	Personal Emoluments	658,496,843	670,689,083	697,665,126	725,720,211
	050	House Allowance	327,227,177	343,971,808	363,202,510	383,642,286
	060	Other Personal Allowances	11,400	11,400	11,400	11,400
	063	Hardship Allowance	14,086,561	14,190,600	14,472,412	14,759,860
	064	Transfer Allowance	1,569,460	1,569,460	1,569,460	1,569,460
	065	Medical Allowance	68,867,391	68,809,217	70,185,401	71,589,109
	068	Training Expenses	-	17,310,976	19,548,384	21,548,114
	080	Passage and Leave Expenses	6,938,779	6,938,779	6,938,779	6,938,779
	100	Transport Operating Expenses	50,821,001	44,796,526	44,796,526	50,796,526
	101	Rehabilitation of Landrovers	15,465,721	11,469,000	11,469,000	15,469,000
	110	Travelling and Accommodation Expenses	32,489,993	37,796,526	43,796,526	46,036,773
	115	Bicycle Allowance	1,531,360	1,282,880	1,282,880	1,282,880
	120	Postal and Telegram Expenses	2,003,031	2,377,318	2,377,318	2,377,318
	121	Telephone Expenses	10,483,338	14,163,075	10,834,748	15,834,748
	130	Official Entertainment	-	120,000	120,000	120,000
	403	Soil Conservation Works	699,160	-	-	-
	409	Purchase of Prefabs	850,000	-	-	-

Source: Vote R 10, Ministry of Agriculture, Government of Kenya, pp. 376-78.



Handout: Programme-oriented budget

Vote 26: Agriculture

Aim

The Department of Agriculture aims to lead and support sustainable agriculture and promote rural development through ensuring access to sufficient, safe and nutritious food; eliminating skewed participation and inequity in the sector; maximising growth, employment and income in agriculture; enhancing the sustainable management of natural agricultural resources and ecological systems; ensuring effective and efficient governance; and ensuring knowledge and information management.

Programme purpose and measurable objectives

Programme 1: Administration

Purpose: Provide the Department with political and strategic leadership, and management and administration.

Programme 2: Farmer Support and Development

Purpose: Promote stability, competitiveness, growth and transformation in the agricultural sector by developing policies governing farmer settlement, food security, rural development, cooperative registration, and agricultural risk and disaster management.

Measurable objective: To enhance equitable access and sustained participation in the agricultural sector in order to eliminate skewed participation and inequity in the sector.

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Programme 7: National Agricultural Regulatory Services

Purpose: Develop and monitor risk management policies for the control of animal and plant diseases, food safety, and the use of genetically modified organisms.

Measurable objective: To maintain and improve management systems to mitigate risks associated with food, agricultural pests and diseases, and genetic resources.

Source: South African Budget Vote 26



Exercise: The participants introduce themselves

1. Find a partner for this exercise.
2. Exchange with your partner any information on yourself as a person that you consider relevant (for example: your name, age, educational background).
3. Ask your partner the following questions:
 - €# How would you describe the work that you do?
 - €# What are the main reasons for your applying for this workshop?
 - €# What do you expect to learn during this workshop that will be useful in your work?
 - €# In what aspects of your work do you think it might be of relevance?
4. Both should honestly answer the following question: “What did you always want to do, but could not do because you are a man/woman?” (“Secret wish question”)
5. Note your partner’s answers on the cards provided.
6. After 20 minutes, you should discuss with the other participants in the plenary.
7. Please present a short portrait of your partner and his/her “secret wish” to the plenary.



Exercise: Prioritisation of state expenditures (1)

1. You should form working groups. Each group should consist of only female or male participants.
2. Think of the situation of women (if you are female) or of men (if you are male) in your country and agree on eight needs which you perceive as being most important to be fulfilled in the next budget period.
3. You should prioritise budget expenditures accordingly by allocating the share of an assumed budget (= 100%) to the following eight sectors:

Sector	Allocation in %
Human Resource Development	
Agriculture and Rural Development	
Tourism, Trade and Industry	
Public Administration	
Physical Infrastructure	
National Security	
Public Safety, Law and Order	
Information Technology Sector	

Source: Kenyan budget classification

4. Please present your findings to the plenary and explain your choices.



Exercise: Prioritisation of state expenditures (2)

1. You should form working groups. Each group should consist of only female or male participants.
2. Think of the situation of women (if you are female) or of men (if you are male) in your country. Define the most important intervention areas that could improve their living situation and that you think should be addressed in the next budget period.
3. You should prioritise budget expenditures accordingly by allocating the share of an assumed budget (= 100%) to the following sectors:

Sector	Allocation in %
Defence	
Law and Order	
Health	
Education	
Water and Sanitation	
Agriculture	
Social Security	
Subsidies on Food Items	
Construction of Highways	
Construction of Feeder Roads	
Infrastructure for Provision of Electricity	
Infrastructure for Provision of Energy	
Subsidies for Export Promotion	

4. Please present your findings to the plenary and explain your choices.



Exercise: Prioritisation of private household expenditures

1. You should form working groups. Each group should consist of only female or male participants.
2. Imagine that you are married and have two children. Your daughter is nine years old, and your son is 15. You are the head of the household and must decide on how to spend the household's monthly income of KSh 50,000.
3. You should prioritise the expenditures of your household by allocating them to the following items:

Items	Allocation in %
Food	
Rent/Property Tax	
Electricity and Gas	
Transport	
Clothing	
Furniture	
Medical Care	
Education	
Appliances	
Entertainment	
Gifts	
Newspapers/Books	
Pocket Money for the Children	
Household Consumables	
Cosmetics	
Cigarettes, etc.	
Savings	
Others (please specify):	

4. Please present your findings to the plenary.



Exercise: Practical and strategic gender needs

1. Please form working groups. Each group should consist of only female and male participants, respectively.
2. Please discuss and list 10 needs which you perceive as most important for the female (if you are a woman) or male (if you are a man) population in your country to be fulfilled in the short run (1 year) and in the long run (5 years), respectively.
3. Please prioritise the needs by allocating the share of an assumed budget (= 100%) to each need in the short run and in the long run.
4. Please present your findings to the plenary.



Exercise: Gendered roles of women and men

1. Please define the reproductive, productive and community roles of women and men in your country. Are they paid or unpaid?
2. Please make a note of the government's policies that support these different roles.

Definitions	Reproductive role: Encompasses tasks such as bearing and rearing children and housework.	Productive role: Covers the tasks that society usually acknowledges as work.	Community role: Encompasses the tasks that women and men perform in maintaining the life of the community outside their immediate households.
Roles of women			
Supporting government's policies			
Roles of men			
Supporting government's policies			

MODULE 2

GENDER RESPONSIVE BUDGETING AN INTRODUCTION



Module 2: Gender Responsive Budgeting – An introduction

Objective	To introduce the approach of gender responsive budgeting.
Duration	90 minutes
Methods	Brainstorming PowerPoint presentation Group work
Training aids	Multimedia projector ZOPP Cards
Handouts	Gender responsive budgeting (1) Gender responsive budgeting (2) Gender responsive budgeting in the Beijing Platform for Action Classification of expenditures Public expenditures affect women and men differently Advantages of gender responsive budgeting
Exercise	Actors in the budgeting process

Background information:

Policy commitments can only be achieved if sufficient funds are allocated for their implementation. The budget is government's most important policy tool as without adequate funding, no other policy will be effective. Gender responsive budgeting is a tool to monitor if policy commitments related to poverty reduction and gender equality are reflected in adequate budget allocations.

At first glance, the figures and numbers compiled in a budget seem to be *gender-neutral*. However, empirical studies have shown that expenditure patterns and the way that a government raises its revenues have a different impact on women and girls as compared to men and boys, often to the detriment of the former. This is due to the socially determined roles women and men play in society. The gendered division of labour, different responsibilities and capabilities, and the different constraints that women and men face generally leave women in an unequal position in relation to the men in their community, with less economic, social and political power. Therefore, budgets that at face value may appear *gender-neutral* may in fact be *gender-blind*.

Gender responsive budgeting aims at mainstreaming gender into public finance. The process of gender responsive budgeting eventually results in gender responsive budgets. Gender responsive budgets are not separate budgets for women, but instead, general budgets that are planned, approved, executed, monitored and audited in a gender-sensitive way.

Different dimensions need to be considered when looking at budgets from a gender perspective:

- ⚡ In most countries a large part of expenditure is spent on *public employment*. Are women employed as civil servants to the same extent as men and at the same grades, thus benefiting equally from public expenditure?
- ⚡ Women as *users of publicly funded services* may have different needs and priorities to men due to their different social roles and responsibilities. Are they taken into consideration equally?
- ⚡ Governments *transfer* money to private households in the form of pensions, social security payments, relief payments after natural disasters, etc. Do women have the same entitlements to these payments as men?
- ⚡ Women and men have different *time-use patterns*. It is a well established fact that women spend more hours than men doing unpaid work, while men conversely spend more hours doing paid work. In total, women work longer hours per week than men. Budget allocations may increase or decrease the workload of either sex.
- ⚡ Women's priorities will only be taken into account if they are sufficiently represented in *budget decision-making* positions.

- ⌘ To reduce gender inequalities that leave women in a less favourable situation, *targeted women-specific policies* have to be implemented in addition to general gender mainstreaming, until a level playing-field has been established. These policies must be conducive to empowering women and to overcoming gender stereotypes, and sufficient funds should be allocated to them.

In distinction from other budget initiatives that focus on the distributional impact of budgets, such as pro-poor budget initiatives, gender responsive budgeting does not treat households as a single unit but instead highlights that the access to and control over resources and the bargaining power of household members differ. Empirical studies from several countries clearly show that women tend to spend money on their families' and children's welfare (nutrition, clothes, education) while men tend to spend on their own leisure activities. It therefore makes a difference whether public expenditures are targeted at women or men, or if revenue-raising fall predominantly on women or men.

Gender responsive budgeting explicitly takes into account the unpaid care work which all over the world is undertaken primarily by women. Unpaid care work involves activities such as housework, childcare, and care for others in the household that is done on an unpaid basis by family members. This work is not covered by the System of National Accounts (SNA) which provides the rules for computing gross domestic product (GDP) and thus the statistics for macroeconomic policy decisions. The care economy therefore remains invisible, although it is of utmost importance for the functioning of the market economy and for the maintenance of the social framework of a society. Gender responsive budgeting aims at:

- ⌘ Formulating the budget in a gender-responsive way
- ⌘ Linking gender responsive policies with adequate budgetary funds
- ⌘ Linking policies to empower women and to fight against gender based violence with adequate budgetary funds
- ⌘ Executing the budget in a way that benefits women and men, girls and boys equitably
- ⌘ Monitoring the impact of expenditure and revenue raising from a gender perspective
- ⌘ (Re)prioritising expenditure and (re)formulating revenue raising policies in a gender equitable way by taking the different needs and priorities of women and men, girls and boys into account

Further Readings:

- ☑ Budlender, D.; Elson, D.; Hewitt, G.; Mukhopadhyay, T.: Gender Budgets Make Cents. Understanding Gender Responsive Budgets, Commonwealth Secretariat, London, 2002. http://www.idrc.ca/fr/ev-66711-201-1-DO_TOPIC.html
- ☑ Budlender, D.; Hewitt, G.: Engendering Budgets, Commonwealth Secretariat, London, 2003. <http://www.eldis.org/static/DOC16637.htm>

Session guide:

1. The aim of this session is to introduce the approach of gender responsive budgeting.
2. Ask participants to brainstorm how expenditure and revenue-raising policies could have a different impact on women and men. Ask them to write their ideas on ZOPP cards and pin them to the pin board.
3. Deliver a PowerPoint presentation containing definitions and the main approaches of gender responsive budgeting.
4. Emphasise that when analysing expenditures, one can either focus on public employment or on public service delivery and transfer payments.
5. You should highlight that gender responsive budgeting has both a technical aspect (the formulation of the budget in a gender-sensitive way, and analysis of the impact of revenue-raising and expenditure patterns on women and men) as well as a political one (reprioritisation of expenditures in favour of women and girls, especially poor women and girls). Emphasise that gender responsive budgeting is not only concerned with numbers and figures, but also with the underlying policies.
6. Emphasise that gender responsive budgeting is not only about applying tools, but also about changing public resource management systems, formats and procedures.
7. Explain how gender responsive budgeting differs from other approaches such as pro-poor budgeting.
8. If you are familiar with feminist economic approaches, then you should elaborate on these and put gender responsive budgeting in the context of feminist economics. Emphasise that false assumptions in neoclassical economic theory result in macroeconomic policies that may affect women negatively. Refer to the handout: public expenditures affect women and men differently. Ask participants if they can think of similar examples in the context of their country.
9. Distribute the handout “classification of expenditures” and emphasise that the first two categories of expenditures make up only a small percentage of the total budget. Therefore, the main focus of gender responsive budgeting initiatives should be on the general or mainstream budget expenditures.
10. Distribute the handout on the advantages of gender responsive budgeting and provide examples for each point.
11. Distribute the exercise “actors in the budgeting process”. Ask participants to form working groups and to identify different actors involved in the budgetary process (at national, provincial and local level), to compile their activities and to think of possible entry points for the integration of a gender perspective. Ask participants to report their findings back to the plenary.

12. Point out that gender responsive budgeting may serve to monitor the implementation of a government's commitment to gender equality. Prepare a handout containing the main gender policies in the country that participants come from, distribute it and explain the content of the different policies mentioned and their relation to gender equality and gender responsive budgeting.
13. Government officials may be worried that the introduction of gender responsive budgeting will add to their work burden. You should emphasise that gender responsive budgeting will become routine if the government takes it seriously and will not necessitate significant additional efforts.



Handout: Gender responsive budgeting (1)

Gender responsive budgeting:

- €# is an approach designed to mainstream the gender dimension into all stages of the budget cycle;
- €# is the analysis of the impact of any form of public expenditure or method of raising revenues on women and girls as compared to men and boys;
- €# can take into account other categories of inequality such as age, religious or ethnic affiliation, or the place of residence (urban/rural, different provinces), which can then be incorporated into gender responsive analyses;
- €# is not about whether an equal amount is spent on women and men, but whether the spending is adequate to women's and men's needs;
- €# comprises the drawing up of proposals designed to reprioritise expenditures and revenues, taking into account the different needs and priorities of women and men;
- €# results eventually in gender responsive budgets, but NOT in a separate budget for women.



Handout: Gender responsive budgeting (2)

Gender and budgets

Budgets are the most important policy tools available to a government and reflect its political priorities. Although the numbers and figures compiled in the budget documents might seem gender-neutral, empirical findings show that expenditure patterns and the way that a government raises revenue have a different impact on women and girls as compared to men and boys, often to the detriment of the former. This is due to the socially determined roles that women and men play in society, the gendered division of labour, different responsibilities and capabilities, and the different constraints that women and men face, which normally leave women in an unequal position in relation to the men in their community, with less economic, social and political power.

Gender responsive budgeting

Gender responsive budgeting is an approach designed to mainstream the gender dimension into all stages of the budget cycle. In general, gender responsive budgeting aims at analysing the different impacts of a state's national and local expenditure as well as revenue policy on women and girls, and on men and boys, respectively. In addition to the impact analysis, gender responsive budgeting comprises making proposals to reprioritise expenditures and revenues, taking into account the different needs and priorities of women and men. Depending on the country-specific context, other factors of inequality may also be focused on, such as age, religious or ethnic affiliation, or the place of residence (urban/rural, different provinces).

Gender responsive budgets

The gender responsive budgeting process aims at producing gender responsive budgets. These budgets (which are synonymous with gender-sensitive budgets, gender budgets and women's budgets) are not separate ones for women, but rather government budgets that are planned, approved, executed, monitored and audited in a gender-sensitive way.

How does gender responsive budgeting differ from other budget initiatives?

In distinction to other budget initiatives that focus on the distributional impact of budgets, such as pro-poor budget initiatives, gender responsive budgeting does not treat each household as a unit, but instead highlights the fact that access to and control over resources and the bargaining power of household members differ. It also explicitly takes into account unpaid work in the reproductive sector, which is primarily undertaken by women all over the world, yet is not covered by the System of National Accounts (SNA), which provides the key statistics for macroeconomic policy decisions. Thus, the so-called care economy remains invisible, although it is of utmost importance for the functioning of the market economy and for the maintenance of the social framework of a society.



Handout: Gender responsive budgeting in the Beijing Platform for Action

References to gender responsive budgeting in the **Beijing Platform for Action**:

A. Women and poverty

Strategic objective A1: *Review, adopt and maintain macroeconomic policies and development strategies that address the needs and efforts of women in poverty.*

Actions to be taken:

58. By governments:

d) Restructure and target the allocation of public expenditures to promote women's economic opportunities and equal access to productive resources and to address the basic social, educational and health needs of women, particularly those living in poverty.

F. Women and the economy

Strategic objective F1: *Promote women's economic rights and independence, including access to employment, appropriate working conditions and control over economic resources.*

Actions to be taken:

165. By governments:

i) Facilitate, at appropriate levels, more open and transparent budget processes; governments.

Financial arrangements:

345. ... Full and effective implementation of the Platform for Action, including the relevant commitments made at previous United Nations summits and conferences, will require a political commitment to make available human and financial resources for the empowerment of women. This will require **the integration of a gender perspective in budgetary decisions on policies and programmes, as well as the adequate financing of specific programmes for securing equality between women and men.** To implement the Platform for Action, funding will need to be identified and mobilized from all sources and across all sectors. The reformulation of policies and reallocation of resources may be needed within and among programmes, but some policy changes may not necessarily have financial implications. Mobilization of additional resources, both public and private, including resources from innovative sources of funding, may also be necessary.

A. National level:

346. The primary responsibility for implementing the strategic objectives of the Platform for Action rests with governments. To achieve these objectives, governments should make efforts to systematically **review** how women benefit from public sector expenditures; **adjust** budgets to ensure equality of access to public sector expenditures, both for enhancing productive capacity and for meeting social needs; and achieve the gender-related commitments made in other United Nations summits and conferences. To develop successful national implementation strategies for the Platform for Action, governments should allocate sufficient resources, including resources for **undertaking gender-impact analysis.** Governments should also encourage non-governmental organizations and private-sector and other institutions to mobilize additional resources.

Source: Fourth World Conference on Women, Platform for Action, 1995.

<http://www.un.org/womenwatch/daw/beijing/platform/plat1.htm>



Handout: Classification of expenditures

In 1984, Australia was the first country to analyse the gender-specific distributional impacts of state expenditures. Their analysis was based on the following distinction between three specific types of expenditures:

Specifically identified gender-based expenditures of government departments and authorities

Examples:

- Š Women's health programmes
- Š Special education initiatives for girls
- Š Employment policy initiatives for women
- Š Reintegration programmes for male soldiers
- Š Initiatives to address violence against women
- Š Micro credit programmes for women
- Š Scholarships for women

Equal employment opportunity expenditure by government departments and authorities on their employees

Examples:

- Š Training for women clerical officers or managers
- Š Rewriting of job descriptions to reflect equal employment opportunity principles
- Š Provision of child-care facilities
- Š Parental leave provisions

General or mainstream budget expenditure by government departments and authorities assessed for its gender impact

General question:

- Š Does the budget, minus the above two types of expenditure, reflect gender equity and equality objectives?

Specific sample questions:

- Š Who are the users of health services?
- Š Who receives agricultural support services?
- Š Who benefits from expenditures on tertiary education?



Handout: Public expenditures affect women and men differently

Spending cuts have their price – and this is usually paid by women

It has been observed in many countries that cuts in spending on social services or the introduction of user fees typically have a negative impact on women and girls in general, and on poor women and girls in particular. When education becomes more costly for families, girls are often the first to be withdrawn from school. After education fees were introduced in the early 1990s in Zambia, for example, school drop-out rates increased, mostly for girls. Similarly, in Kenya girls were found to be twice as likely to be pulled out of school as boys when families found they could no longer afford school fees.

Changes in public service provision may increase women's time burden

Hospital health service programmes that increase efficiency by using performance indicators such as “a reduction in the cost per patient treated” have incentives to reduce the provision of ancillary services such as the laundry, and to discharge patients earlier. As a result, women dedicate more time to doing laundry for hospitalised relatives and to taking care of sick family members. Much-praised efficiency gains in the health sector therefore often conceal a shift of costs onto women in private households.

Gender and public investment priorities

Given the different responsibilities in providing services for the family, women and men have different priorities for public investment. A study of *panchayats* (local governing councils) in India, for example, found that female *panchayat* heads tend to emphasise drinking water provision, whereas male heads tend to emphasise irrigation systems. The reservation of positions for women in local governments in India has had a significant impact on the investment decision-making process and has helped to promote issues that are particularly important to women (such as time-saving infrastructure).

The Millennium Project Task Force on Education and Gender Equality has identified investment in infrastructure to reduce the time burden of women and girls as being one of seven strategic priorities that need to be addressed to achieve Millennium Development Goal Number 3 (Promote gender equality and empower women). Three types of infrastructure are considered as being particularly important: energy, transport, and water and sanitation.

Source: Millennium Project Task Force on Gender Equality: Taking action: achieving gender equality and empowering women, 2005. <http://www.unmillenniumproject.org/documents/Gender-complete.pdf>



Handout: Advantages of gender responsive budgeting

Monitoring of the achievement of policy goals

Gender responsive budgeting provides a tool for monitoring the extent to which the Millennium Development Goals and other policy goals have been achieved in a gender-aware manner.

Alleviating poverty more effectively

Although the available statistical data on income poverty cannot provide incontrovertible evidence that women are always more affected by income/consumption poverty than men, it is widely acknowledged that women fare worse than men with respect to social indicators; that women and men experience poverty differently (and that women experience it more severely); and that both face different constraints to overcome poverty. Women are also more affected by time poverty than men. If women's needs are not taken into account on equal terms, there is the risk that poverty reduction policies will fail.

Enhancing economic efficiency

Several studies have shown that there is a positive correlation between diminishing gender inequality and higher growth rates. Women's productivity increases disproportionately if their access to information, credit, extension services, inputs and markets is enhanced and if their time burden is reduced through, for example, investment in labour-saving infrastructure.

Achieving gender equity/equality

Achieving gender equity requires equality of outcomes for women and men. This implies the recognition of the different needs, preferences and interests that affect the way women and men benefit from the same policies.

Advancement towards the realisation of women's rights

Gender responsive budgeting seeks to measure the gaps between policy commitments with respect to human rights and women's rights instruments (including the Convention on the Elimination of All Forms of Discrimination against Women (CEDAW), the adequacy of resource allocation, and the outcomes of policies.

Achieving good governance

The process of improving the delivery of goods and services to women, men, girls and boys in a fair, just, and responsible way has to be considered as an integral part of the definition of good governance. Good governance requires a participatory approach to the policymaking process, so that the different perspectives of different groups of citizens, including women, are represented.

Enhancing accountability and transparency

Gender responsive budgeting is a powerful tool for highlighting gaps between international commitments (such as those established at the Fourth World Conference on Women in Beijing in 1995, as well as in national policy documents), and the amount of public spending earmarked for the achievement of gender-specific benchmarks and targets. Gender responsive budgeting necessitates the availability of sex-disaggregated data plus access to programme information. By tracking how allocated money is spent, gender responsive budgeting increases both accountability and transparency.



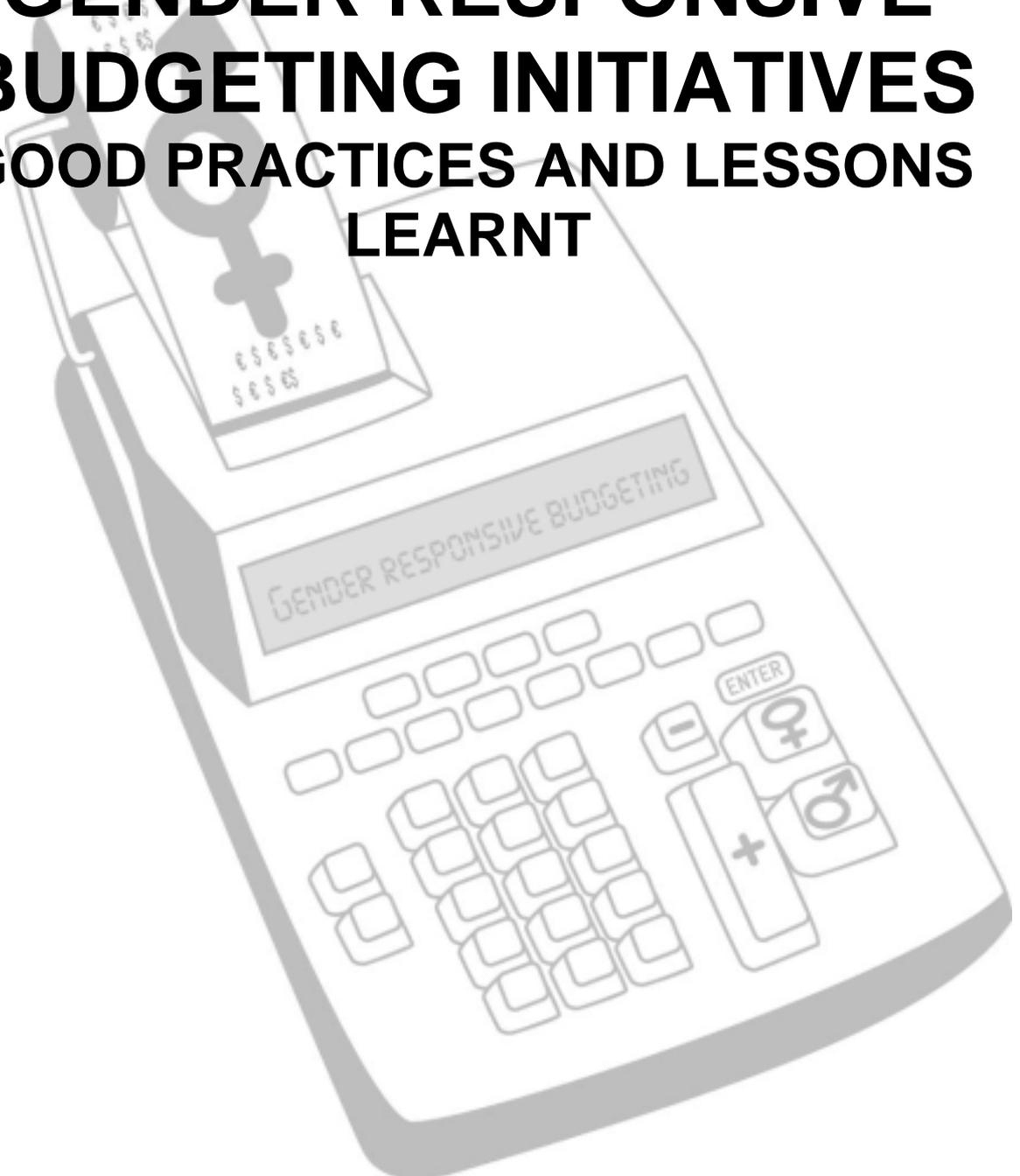
Exercise: Actors in the budgeting process

1. You should form working groups.
2. List the main actors in the budgeting process at the national, provincial and local level in your country, plus their respective activities.
3. You should discuss possible entry points for the integration of a gender perspective.
4. Please present your findings to the plenary.

Actor/Level	Activities	Entry Points

MODULE 3

GENDER RESPONSIVE BUDGETING INITIATIVES GOOD PRACTICES AND LESSONS LEARNT



**Module 3: Gender Responsive Budgeting Initiatives –
Good practices and lessons learnt**

Objective	To introduce approaches of gender responsive budgeting initiatives, good practices and lessons learnt.
Duration	60 minutes
Methods	Lecture with PowerPoint presentation Group work
Training aids	Multimedia projector Flipchart
Handouts	Achievements of gender responsive budgeting initiatives Lessons learnt
Exercise	Presentation of experiences of gender responsive budgeting initiatives
Additional material	<p>Copies of country case studies, e.g. from</p> <p>☑ Budlender, D.; Hewitt, G.: Gender Budgets Make More Cents. Country Studies and Good Practice, Commonwealth Secretariat, London, 2002. http://www.internationalbudget.org/resources/library/GBMMC.pdf</p> <p>☑ UNIFEM: Gender Budget Initiatives. Strategies, Concepts and Experiences, 2002. http://www.idrc.ca/uploads/user-S/11271649581Gender_Budget_Initiatives.pdf</p>

Background information:

The world's first gender responsive budgeting initiative (GRBI) was established in Australia in 1984. The government-led initiative, which was coordinated by the Offices on the Status of Women, eventually covered the budgets of the federal, state and territorial governments, and assessed the impact of expenditures and some elements of revenue on women and girls. The results were published in women's budget statements that were presented together with the annual budget documents. The initiative was finally abandoned at the federal level in 1996 after a change in government.

One of the best documented GRB initiatives was established in South Africa in 1995 after the end of apartheid. In contrast to the government-led Australian initiative, the South African Women's Budget Initiative (WBI) was led by two policy research non-governmental organisations (NGOs) and a parliamentary committee. Within the first three years of operation, the initiative analysed all 27 votes of the national budget from a gender perspective, and later also focused on local level budgets and revenues. The detailed findings of the research from the first few years were published in a series of books. In addition, the initiative produced shorter easy-to-read booklets that summarised the research findings and were disseminated to a wider public. In cooperation with the gender training network (GETNET), the WBI also developed workshop material for capacity-building activities related to gender responsive budgeting.³

Since the Fourth World Conference on Women held in Beijing in 1995, GRB initiatives have been established in more than 60 countries across all continents, and the number is still growing. In several Poverty Reduction Strategy (PRS) countries, GRB initiatives have been established in connection with the PRS process, led by a variety of actors. In some countries, such as Uganda, women parliamentarians are working together with community activists and women researchers to develop GRB initiatives⁴; while in other countries such as Rwanda, Mozambique and Kenya, they are led by different ministries.

GRB initiatives differ in terms of the following:

- ⚡ *Actors:* In some countries, governmental organisations such as the Ministry of Finance or the Ministry of Women's Affairs take the lead. In others, GRB is taken forward by NGOs, research institutes or parliamentarians.
- ⚡ *Scope of analysis:* Some initiatives cover all budget portfolios. Others start by working on pilot sectors. In many developing countries, GRB initiatives have started to address education, health and agriculture.

³ The manual entitled "Money Matters" was funded by the Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ) GmbH.

⁴ For more information, see www.fowode.co.ug

- €# *Tools and approach adopted:* Several tools for GRB have been proposed, e.g. gender-aware policy appraisals or sex-disaggregated public expenditure incidence analysis. Each initiative has to choose the tool(s) and approaches that are most suitable for the local context, for the skills and intentions of the actors, and which best fit the country's budget system.
- €# *Activities carried out:* Initiatives differ in terms of the kind of activities they carry out. Some focus on research, some on awareness raising or advocacy, and others on capacity building.

In general, GRB initiatives have achieved the following outcomes:

- €# The awareness that budgetary decisions can have an impact on gender relations and gender equality has increased.
- €# The capacity to analyse budgets from a gender perspective has increased.
- €# Budget allocations have been reprioritised in favour of women and girls.
- €# Budget guidelines and formats have been changed.
- €# Debates on gender issues have taken place in parliament, and gender issues have been mentioned in the budget speeches of ministers of finance.
- €# Budget processes have become more transparent.
- €# The participation of the civil society in the budgetary process has increased.

Some of the lessons learnt are as follows:

- €# Quick results should not be expected from GRB initiatives. The integration of a gender perspective into the different stages of the budget cycle is a medium to long-term task. Therefore, it is important to persevere and to try to institutionalise GRB approaches.
- €# GRB has proven to be more successful in countries where internal and external government initiatives complement each other, and where there is collaboration on issues. This necessitates mutual trust, transparency and access to information and documents.
- €# Often the proposed tools cannot be applied because sex-disaggregated data are lacking. The collection of such data as well as time-use data must therefore be one of the first steps taken.
- €# The size of the budget is determined by macroeconomic decisions based on macroeconomic models. For a budget to be truly gender-responsive, the macroeconomic model that it is based on needs to incorporate a gender perspective. In addition, the gender implications of monetary, trade and exchange rate policies need to be assessed.

A recent evaluation of GRB initiatives in Commonwealth countries⁵ concluded with the following additional lessons learnt:

- ⚡ Political and bureaucratic commitment and the right attitude are required.
- ⚡ National women's machineries need strengthening.
- ⚡ Ministries of finance and sectoral ministries must take ownership.
- ⚡ Awareness and capacity building need to be enhanced.
- ⚡ Donors need to commit to longer-term involvement.
- ⚡ Civil society organisations (CSOs) play an important role.
- ⚡ Ongoing monitoring, review and appropriate data collection are required.

Further Readings:

🔗 Budlender, D.: A Global Assessment of Gender Responsive Budget Initiatives. pp. 83-164 in Gender Budgets Make Cents
http://www.idrc.ca/en/ev-66711-201-1-DO_TOPIC.html

🔗 Budlender, D.; Hewitt, G.: Gender Budgets Make More Cents. Country Studies and Good Practice, Commonwealth Secretariat, London, 2002.
http://www.idrc.ca/fr/ev-66710-201-1-DO_TOPIC.html

🔗 UNIFEM: Gender Budget Initiatives. Strategies, Concepts and Experiences, 2002.
http://www.gender-budgets.org/en/ev-64788-201-1-DO_TOPIC.html

⁵ Commonwealth Secretariat: Gender-responsive Budgeting in the Commonwealth: Progress and Challenges, 2004, pp. 4-6.

Session guide:

1. Prepare and deliver a PowerPoint presentation on different GRB initiatives, best practices and lessons learnt based on the background information. Emphasise that GRB initiatives differ in terms of actors, scope, activities, and methods and tools applied. Point out that there is no blueprint for how to design and implement gender responsive budgeting.
2. Distribute the handouts on GRB initiatives, achievements and lessons learnt.
3. If time allows, you may want to carry out the following exercise: first, form different working groups and provide each working group with a different case study. You can copy some of the material off the internet (www.gender-budgets.org). You should choose the case studies based on the target group for your training. With regard to government officials, for example, it may be useful to choose country examples where the respective Ministry of Finance has taken the lead, e.g. Sri Lanka, Rwanda, India or Pakistan. If you are training members of CSOs or parliamentarians, on the other hand, you may want to choose South Africa, Tanzania or Uganda as examples. Ask each group to read through the case study and then to prepare a presentation on flipchart paper for the plenary organised around certain guiding questions, e.g. which actors were involved in the initiative, which sectors were covered, what were the main activities, which problems were encountered, etc. (see exercise: presentation of experiences of gender responsive budget initiatives). Ask each group to report back to the plenary.
4. Discuss with participants what can be learnt from each initiative and which steps should be taken in their own country's context.



Handout: Achievements of gender responsive budgeting initiatives

The achievements of gender responsive budget (GRB) initiatives include the following:

- ⌘ Awareness with regard to the gender impacts of budgetary decisions has increased.
- ⌘ The capacity to analyse budgets from a gender perspective has increased.
- ⌘ Public expenditures have been reprioritised in favour of women and girls.
- ⌘ Budget guidelines and formats have been changed.
- ⌘ Gender issues have been debated in parliament and mentioned in the budget speeches of ministers of finance.
- ⌘ Budget processes have become more transparent.
- ⌘ The civil society's participation in the budgetary process has increased.



Handout: Lessons learnt

- ⚡ Quick results are not to be expected from GRB initiatives: the integration of gender analysis into the budget cycle is instead a medium to long-term task. Therefore, it is important to ensure continuity and to institutionalise gender responsive budgeting.
- ⚡ GRB has proven more successful in countries where internal and external government initiatives complement each other and where there has been direct collaboration. This necessitates mutual trust, transparency and the accessibility of information and documents.
- ⚡ Often, tools cannot be applied because sex-disaggregated data are lacking. The collection of such data as well as time-use data therefore has to be one of the first steps.
- ⚡ The size of the budget is determined by macroeconomic decisions based on a certain macroeconomic model. GRB represents an important step towards the “engendering” of macroeconomic policy; however, the integration of a gender perspective into macroeconomic policies should go further. Macroeconomic models should incorporate a gender perspective, and the gender implications of monetary, trade and exchange rate policies should be assessed.

Lessons learnt from Commonwealth countries:

- Political and bureaucratic commitment and the right attitude are required.
- National women’s machineries need strengthening.
- Ministries of finance and sectoral ministries must take ownership.
- Awareness building and capacity building need to be enhanced.
- Donors need to commit to longer-term involvement.
- CSOs play an important role.
- Ongoing monitoring, review and appropriate data collection are required.

Source: Commonwealth Secretary: Gender-responsive Budgeting in the Commonwealth: Progress and Challenges, 2004, pp. 4-6.



Exercise: Presentation of experiences of gender responsive budget initiatives

1. Please read the case study that you have been provided with.
2. You should prepare a five-minute presentation that covers the following topics:
 - The actors who launched the initiative (e.g. ministries, NGOs, researchers)
 - Any other actor involved
 - Focus on expenditures or revenues
 - Sectors covered (e.g. health, education, agriculture)
 - Activities (e.g. research, advocacy)
 - Scope (national/local level)
 - Results (e.g. reprioritisation of expenditures, mainstreaming gender into guidelines)
 - Problems encountered.

Country:

Actors that launched the initiative	
Additional actors involved	
Focus of the initiative	
Sectors covered	
Activities	
Scope	
Results	
Problems encountered	

MODULE 4

DIFFERENT STAKEHOLDERS AND STEPS OF IMPLEMENTATION



Module 4: Different stakeholders and steps of implementation

Objective	To introduce different stakeholders and steps of implementation of GRB
Duration	60 minutes
Methods	PowerPoint presentation Group work
Training aids	Flipchart Whiteboard
Handouts	Steps to implement and institutionalize GRB GRB in Tanzania
Exercise	Roles of different stakeholders Change of guidelines and formats
Additional material	Copy of a budget call circular

Background information:

Different stakeholders can be involved in gender responsive budgeting. They have different roles and carry out different activities. However, who is involved in gender budget work differs from country to country.

The Ministry of Finance plays a central and crucial role in gender responsive budgeting. This ministry is in the position to make changes in the budget call circular, it checks the line ministries' submissions against the prescriptions of the budget call circular, it approves the format for gender budget statements and it can publish gender budget statements.

Sector ministries are responsible for submitting budget estimates to the Ministry of Finance and executing budgets according to their sector policies and priorities. They need to take into account gender-aware sector-specific research findings when formulating policies and drawing up budgets. They prepare submissions in line with the budget call circular and prepare gender budget statements for their respective sector.

The Ministry of Women's Affairs/Gender in most countries has the mandate to lobby for mainstreaming of gender in all policies, projects and programmes of the government. It should have the capacity to monitor the process of the implementation of gender responsive budgeting.

Researchers can carry out post-budget impact analysis or prepare pre-budget scenarios by applying different tools of gender responsive budgeting. The research findings should be widely disseminated and used for lobbying and advocacy.

Statisticians are crucial as good gender budget analyses and gender-sensitive planning and budgeting are dependent on the availability of reliable sex-disaggregated data and other gender-relevant statistics. In some cases, the re-formulation of existing questionnaires would be necessary to collect these data. In other cases the design of new surveys would be needed, for example time use surveys for the collection of time use data.

Civil society organizations can lobby and advocate for budgets that are more pro-poor and gender-equitable. Experience has shown that gender responsive budgeting initiatives are more successful in countries where groups outside the government are involved as a strong pressure group.

Parliamentarians have to approve the budget after it is tabled in the parliament. They should scrutinize the proposed budget from a gender perspective and propose amendments. However, the scope to demand amendments differs from country to country.

The *media* can play an important role in ensuring transparency and accountability by a reporting about budget decisions from a gender perspective.

Donors play a role in gender responsive budgeting by funding gender-responsive budgeting activities and providing technical advice.

Several steps are necessary to implement and institutionalize gender responsive budgeting:

Collection of gender-sensitive data

The availability of gender-sensitive data is fundamental for gender responsive budgeting. Without sufficient data a meaningful analysis is much more difficult.

Sensitisation of policy makers

Gender responsive budgeting is not only about budgeting but also about policy making and planning. It is therefore important to raise awareness among policy makers about gender issues and provide them with skills to analyse and address the issues.

Sensitisation of planning and budget officers in the Ministry of Finance and the budget departments of line ministries

Officers who plan and draw up budgets must also be sensitised that the work they are doing may have a different impact on women and men. Sensitisation must focus on a change in attitudes of people and new ways of analysing problems.

Training and capacity building

Awareness raising and sensitisation are not enough. Different stakeholders of gender responsive budgeting need different skills and capacities to make a practical difference in the lives of women, men, girls and boys that can be strengthened by trainings.

Advocacy

Experiences of different gender responsive budgeting initiatives have shown that advocacy is central to the success and sustainability of the initiative. The general objective of advocacy work is to influence decision makers.

Institutionalising gender responsive budgeting

Gender responsive budgeting should not be regarded as an add-on activity. The standard budget guidelines such as the annual budget call circular and reporting forms should be changed in a way that includes gender aspects. In this way gender responsive budgeting will become part of the normal budget routine.

Analysis of the gendered impact of existing revenues and expenditures

Many empirical studies have shown that the way a government raises revenues and its pattern of public expenditures often benefit women less than men or, even worse, affect women negatively. Usually this is not intended, but a result of gender-blind macroeconomic policy making. Post-budget gender-aware impact analysis may reveal the gendered impacts of public finance.

Increase the number of women in budget decision-making

Women and men often have different priorities and needs because of their different social roles and responsibilities. If more women are involved in budget decision-making the probability that women's needs and priorities are addressed by public investments is likely to increase.

Further Readings:

☞ Byanyima, W.; Wehner, J.: Parliament, the Budget and Gender, 2004.
www.ipu.org/PDF/publications/budget_en.pdf

☞ Economic Commission for Africa: Compendium of Best Practices on Gender Mainstreaming. Engendering National Budgets: The Case of Tanzania, 2002.
http://www.uneca.org/eca_programmes/acgd/archive.htm

☞ Sen, G.: Gender Mainstreaming in Finance. A Reference Manual for Governments and Other Stakeholders, Commonwealth Secretariat, 1999.
http://www2.gtz.de/gender-budgets/deutsch/infothek_kontext_finanz.html

Session guide:

1. Emphasize that for a GRBI to be sustainable several steps are necessary to implement and institutionalize gender responsive budgeting. Distribute the handout “Steps to implement and institutionalize GRB” and explain each step.
2. Ask participants to brainstorm which actors may be involved in gender responsive budgeting. Draw a table on the whiteboard and note them down.
3. Distribute the exercise “Role of different stakeholders”. Ask participants to think of the different activities of each stakeholder. Add the different activities to the table on the whiteboard.
4. Emphasize that GRB is not only about applying tools, but also about changing public resource management systems. This necessitates among other things a change of formats, procedures and guidelines.
5. Ask participants to form working groups. Distribute a copy of the budget call circular and ask participants to carry out the exercise. Allow for sufficient time for reporting back to the plenary.
6. If time allows, elaborate on the case of Tanzania as a best practice example and distribute the related handout.



Handout: Steps to implement GRB

- ⌘ Collection of sex-disaggregated data and time use data
- ⌘ Sensitisation of policy makers
- ⌘ Sensitisation of planning and budget officers in the Ministry of Finance and the budget departments of line ministries
- ⌘ Training and capacity building
- ⌘ Institutionalization of gender responsive budgeting
- ⌘ Analysis of the gendered impact of existing revenues and expenditures
- ⌘ Linking findings of gender impact analysis with policies
- ⌘ Increasing the number of women in budget decision-making



Handout: GRB in Tanzania

The NGO Tanzania Gender Networking Programme (TGNP) has pioneered GRB in Tanzania. The initiative has been successful in influencing macroeconomic policies and processes. They have carried out the following steps:

1. Preparatory activities/planning
2. Action-oriented research activities in the selected sectors
3. Feedback and dissemination of research findings
4. Development of lobbying strategies and tools for parliamentary and public lobbying
5. Capacity building on gender as related to budgets
6. Development of tools/instruments for gender budgeting
7. Information-sharing and coalition building and networking
8. Lobbying government and donors structures and processes
9. Documentation of GRB processes

Source: www.tgnp.org



Exercise: Roles of different stakeholders

Stakeholder	Roles
Ministry of Finance/Department of Finance	
Sector Ministries/Sector Departments	
Ministry of Women's Affairs /Gender	
Parliamentarians	
Non-government organizations	
Researchers and academics	
National Bureau of Statistics	
Media	
Donors	
Others:	



Exercise: Change of guidelines and formats

1. Read through the budget call circular. Identify all places where gender issues could possibly be included. This may concern the formulation of sentences or the change of budget formats. Make propositions for an inclusion of the gender perspective.
2. Note your findings on a flip chart paper.
3. Think of other budget guidelines and formats that should be revised from a gender perspective.
4. Report back to the plenary.

MODULE 5

SEX-DISAGGREGATED STATISTICS, TIME USE DATA AND GENDER INDICATORS



Module 5: Sex-disaggregated statistics, time use data and gender indicators

Objective	To sensitize participants that the collection and analysis of sex-disaggregated and time use data is a prerequisite for GRB. To enable participants to formulate gender indicators.
Duration	60 – 180 minutes
Methods	Brainstorming PowerPoint presentation Fieldwork of participants Calculation exercise
Training aids	Multimedia projector
Handouts	The Millennium Development Goals Sex-disaggregated data and indicators Examples of indicators Time use surveys in sub-Saharan Africa Case study South Africa
Exercise	The 24 hours day – the use of time Definition of indicators
Additional material	☑ Time use questionnaire of South Africa UN Activity classification list http://unstats.un.org/unsd/demographic/meetings/egm/TUse_1000/doclistEGM10_2000.htm

Background information:

The availability of gender-sensitive data is fundamental for gender responsive budgeting. Without sufficient data a meaningful analysis is very difficult. For a country to have gender-sensitive data, two aspects need to be addressed:

- ⌘ Sex-disaggregation of data relating to individuals
- ⌘ Coverage in the data collection and reporting system of issues that are important from a gender perspective.

The second aspect could include some data that cannot be sex-disaggregated because it only affects one sex, such as childbirth. It would also include data on issues such as gender-based violence, which can affect both male and female but where women and girls tend to be the victim more often than men and boys. And it also includes data on time use, where both male and female undertake activities for 24 hours of every day, but the overall patterns tend to differ significantly between male and female.

Gender-sensitive data can be collected by:

- ⌘ Designing specific surveys such as stand-alone time use surveys
- ⌘ Changing the questionnaires of regular surveys such as the household surveys, labour market surveys etc.
- ⌘ Changing the way administrative data are collected in line departments so that information is collected and reported in a sex-disaggregated way
- ⌘ Changing budget forms to include sex-disaggregation in respect of inputs, outputs and outcomes
- ⌘ Changing budget forms to include a discussion of the gender impact of proposed expenditures
- ⌘ Changing the accounting system so that there are special codes which indicate gender-targeted expenditures and so that information relating to individuals is sex-disaggregated.

Among the millennium development goals, gender equality and the empowerment of women constitute a goal (number 3) in its own right. The achievement of this goal will be measured by the target of eliminating gender disparity in primary and secondary education “preferably by 2005” and in all levels of education no later than 2015. There are four indicators specified, as follows:

- ⌘ Ratio of girls to boys in primary, secondary and tertiary education
- ⌘ Ratio of literate females to males aged 15-24 years
- ⌘ Share of women in wage employment in the non-agricultural sector
- ⌘ Proportion of seats held by women in national parliament

In addition, gender equality is a prerequisite for the achievement of all other MDGs.

By now, it is widely acknowledged that women spend longer hours with work than men. For instance, a time allocation study in Benin, undertaken by UNDP in 1998, found that on average women worked 67 hours per week, while men only worked 50 hours in the same period. However, a large amount of the work that is carried out by women remains invisible in national statistics as it is unpaid work. Women's activists and feminist economists have struggled over many years for an improvement of the way in which women's work is conceptualized and measured. They distinguish between five distinct types of work:

1. formal market work
2. informal market work
3. subsistence production
4. unpaid care work
5. volunteer work

In official statistics, work is measured according to the System of National Accounts (SNA). This system was developed by international agencies such as the United Nations, the Organisation for Economic Cooperation and Development (OECD) and the International Monetary Fund to ensure that statistics are comparable and internationally consistent. It provides data of national accounts that are the basis for calculations of GDP, one of the most important – though problematic – indicators to measure economic development and welfare. In 1993, the System of National Accounts was revised. As part of the 1993 revision the production boundary was extended to encompass the *production of all goods for household consumption*. Thus, activities such as the processing and storage of agricultural products for own consumption, carrying water and collecting firewood is now included in the SNA (though due to missing data this is still not the case in many countries). However, the *provision of domestic and personal services by household members for consumption within the household* is still not included in the SNA. The so-called unpaid care work encompasses activities such as cooking, cleaning and caring for children, the elderly and the sick that are mainly carried out by women and girls. UNDP (1997) has estimated that women's "invisible" non-SNA output amounts to around US\$ 11,000 billion a year worldwide. This is equivalent to an extra 48% of the world's GDP.

The 1993 SNA recommended the valuation of activities outside the SNA boundary and the construction of "satellite accounts" outside the national accounts to get an idea about women's contribution to the economy. To be able to construct "satellite accounts" the following three steps have to be carried out:

- Collection of time-use data
- Classification of activities
- Valuation of the amount of time use

In the SNA, general production is understood to be a physical process “carried out under the control and responsibility of an institutional unit that uses inputs of labour, capital, and goods and services to produce outputs of goods and services. There must be an institutional unit that assumes responsibility for the process and owns any goods produced as outputs, or is entitled to be paid, or otherwise compensated, for the services provided. A purely natural process without any human involvement or direction is not production in an economic sense” (System of National Accounts, 1993, p. 123).

Any activity is said to be productive or to fall within the “general production boundary” if its performance can be delegated to another person and yields the same desired results (examples: activities such as washing clothes and preparing meals are productive and fall within the general production boundary while washing oneself and eating are non-productive and outside of it). This so-called “third party criterion” was introduced by the economist Margaret Reid as early as in 1934.

Methods to collect time use data can be distinguished according to

- ⌘ Type of survey instrument (full diary with different time slot intervals or open-time intervals; simplified time diaries)
- ⌘ Mode of data collection (interview, self-reporting, observation)
- ⌘ Type of household survey (independent or “stand alone survey”); module of a multi-purpose household survey)

In recent years, new activity classifications have been developed in both developed and developing countries. The United Nations Statistical Division has developed a new activity classification system that shall be more suitable to understand activities in developing countries. It consists of ten broad categories:

- 1 Work in establishments, for example working for government, in a factory or mine;
- 2 Primary production, for example growing maize or other vegetables on a household plot, or collecting fuel and water;
- 3 Work in non-establishments, for example selling fruit and vegetables at the side of a road, or doing hairdressing at home;
- 4 Household maintenance, for example cooking and cleaning the dwelling;
- 5 Care for persons, for example looking after children, the sick or elderly people in the household;
- 6 Community service, for example attending a political meeting or helping other households;
- 7 Learning, for example attending school or doing homework;
- 8 Social and cultural, for example socializing with family or friends;
- 9 Mass media use, for example watching television or listening to the radio;
- 10 Personal care, for example sleeping, eating and drinking, dressing and washing.

The activity categories 1-3 fall within the SNA boundary, they are included in national accounts and thus in the calculation of GDP as productive activities. The activity categories 4-6 do not fall within the SNA boundary, but within the general production boundary while the activities 7-10 are defined as being non-productive.

The amount of time spent on activities within categories 4-6 can be valued by the following different methods:

Input Value Methods (valuation of the amount of time)

- ⌘ Housekeeper wage approach (average wage rate of a housekeeper)
- ⌘ Specialist wage (average wage rates of specialists such as cooks, cleaners, nurses etc.)
- ⌘ Opportunity cost approach (wage rate that the person who has spent time on activities within the categories 4-6 could have earned in the labour market)

Output Method (valuation of the output produced during the time spent on activities within the categories 4-6 valued with market prices)

Further Readings:

☞ Beck, Tony: Using Gender-Sensitive Indicators: A Reference Manual for Governments and Other Stakeholders. Gender Management System Series, Commonwealth Secretariat, London, 1999.

☞ Corner, Lorraine: From Margins to Mainstream. From Gender Statistics to Engendering Statistical Systems, 2003.

[http://www.unifem-ecogov-apas.org/ecogov-
apas/EEGKnowledgeBase/EngenderingNSS/Margins2Mainstream.pdf](http://www.unifem-ecogov-apas.org/ecogov-apas/EEGKnowledgeBase/EngenderingNSS/Margins2Mainstream.pdf)

☞ UN Department of Economic and Social Affairs, Statistics Division: The World's Women 2005. Progress in Statistics, New York, 2006.

<http://unstats.un.org/unsd/demographic/products/indwm/wwwpub.htm>

☞ UNIFEM: Progress of the World's Women 2005: Women, Work and Poverty, New York, 2005.

www.un-ngls.org/women-2005.pdf

Session guide:

1. Emphasize that the gender responsive budgeting tools to be covered in the next module can only be applied if valid and reliable sex-disaggregated data are available.
2. Explain the difference between statistics and indicators and explain why it is important to collect and analyse sex-disaggregated statistics and to define gender indicators.
3. Ask participants to note down the kind of data and indicators they use in their daily work and to identify weaknesses from a gender perspective.
4. Ask participants with which data sources in their country they are familiar with.
5. Distribute the handout “definition of indicators” and ask participants to fill the table in.
6. Explain why it is important to collect time use data. You may give the following example: Time use studies in several countries have revealed that women and girls spend long hours collecting fuel wood, fetching water and transporting goods. One study found that women in Zambia spent more than 800 hours a year collecting fuel wood and 200 hours a year on water provision.
7. Ask participants how time use of women and men may differ.
8. Explain different methods of time use data collection, their advantages and disadvantages. Explain the ten broad categories of the activity classification system that was developed by the United Nations Statistical Division.
9. Explain the “third person criterion” to distinguish productive and non-productive activities.
10. Introduce different methods of valuation of unpaid productive activities.
11. If time allows give a short presentation about the time use survey of South Africa.
12. If time allows carry out the following exercise: Distribute four copies of the exercise “the 24 hours day – the use of time” to each participant. Ask them to fill in all four 24 hours time sheets by interviewing two women and two men. In a session during the next day you may distribute the UN activity classification list and ask participants to classify all activities included in their time sheets accordingly. Participants should then calculate the total amount of time spent on different categories and provide the information differentiated by sex. At the end you may calculate the total amount spent on each category for each sex using an excel spreadsheet. When presenting the results, you should emphasize that this small exercise has no statistical value but highlights trends that are true for the whole society. This exercise – though quite time consuming – has been proven to be eye-opening in view of the different time use patterns of women and men.



Handout: The Millennium Development Goals

Millennium Development Goals	Selected Targets and Indicators
1. Eradicate extreme poverty and hunger	Halve, between 1990 and 2015, the proportion of people whose income is less than one dollar a day. Halve, between 1990 and 2015, the proportion of people who suffer from hunger.
2. Achieve universal primary education	Ensure that, by 2015, children everywhere, boys and girls alike, will be able to complete a full course of primary schooling.
3. Promote gender equality and empower women	Eliminate gender disparity in primary and secondary education, preferably by 2005, and in all levels of education no later than 2015 Indicators: Ratio of girls to boys in primary, secondary and tertiary education Ratio of literate females to males of 15 to 24 years-olds Share of women in wage employment in the non-agricultural sector Proportion of seats held by women in national parliaments
4. Reduce child mortality	Reduce, by two-thirds, between 1990 and 2015, the under-five mortality rate.
5. Improve maternal health	Reduce by three-quarters, between 1990 and 2015, the maternal mortality rate.
6. Combat HIV/AIDS, malaria and other diseases	Have halted by 2015 and begun to reverse the spread of HIV/AIDS. Have halted by 2015 and begun to reverse the incidence of malaria and other major diseases.
7. Ensure environmental sustainability	Integrate the principles of sustainable development into country policies and programs and reverse the loss of environment resources. Halve, by 2015, the proportion of people without sustainable access to safe drinking water. By 2020, to have achieved a significant improvement in the lives of at least 100 million slum dwellers.
8. Develop a global partnership for development	

Gender equality is important not only as a goal in itself, but also as a path towards achieving the other goals. Further reading: World Bank: Gender Equality and the Millennium Development Goals, Washington D.C. 2003 (www.worldbank.org/gender)



Handout: Sex-disaggregated data and indicators

Sex-disaggregated data

The availability of sex-disaggregated data is fundamental for gender responsive budgeting. Without sufficient data a meaningful analysis is very difficult. For a country to have sex-disaggregated data, all data relating to individuals should be collected, presented and analysed in a sex-disaggregated manner.

Gender-sensitive Indicators

An indicator is a statistical measurement that shows the change in a particular context over a given time of period (e.g.: adult literacy rates in a country increased from 24% 1970 to 38% 2000). It differs from statistics because an indicator involves comparison to a norm rather than merely presenting facts.

A gender-sensitive indicator is therefore a measurement of gender-related change over time (e.g., female-male literacy gaps in a country, index : males = 100, 1970: 35, 2000: 60).

Examples:

- Percentage of households headed by women/men
- Percentage of poor households headed by women/men
- Percentage of female/male labour force in agriculture (age 15 and over)
- Percentage of female/male labour force in managerial occupations in the agricultural sector
- Employment/unemployment rate of women/men, urban/rural
- Percentage of women who have access to credit vis-à-vis men
- Percentage of male/female headed households without land
- Percentage average wage rates for agricultural labourers, by sex
- Percentage of property owned or accessible by women (land, houses, livestock), across income groups

Sex-specific indicators

Sex-specific indicators refer to a change in areas relevant to only one sex, e.g. violence against women or maternal mortality.



Handout: Examples of indicators

Education Indicators (disaggregated by sex)

- ⌘ Net primary enrolment or attendance ratio
- ⌘ % of pupils starting grade 1 who reach grade 5
- ⌘ Adult literacy rate
- ⌘ Literacy rate of 15 to 24-year olds

Health Indicators (disaggregated by sex):

Health and Mortality

- ⌘ % of population with access to primary health care services
- ⌘ Estimated HIV adult prevalence rate
- ⌘ HIV prevalence in pregnant women
- ⌘ Infant mortality rate
- ⌘ Under 5 mortality rate

Reproductive Health

- ⌘ Maternal mortality ratio
- ⌘ % of births attended by skilled health personnel
- ⌘ Contraceptive prevalence rate

Child Health and Welfare

- ⌘ % of 1-year-old children immunized against measles
- ⌘ % of children under 15 who are working

Gender Equality and Women's Empowerment Indicators

- ⌘ Ratio of girls to boys in secondary school enrolment
- ⌘ Female share (%) of paid employment in non-agricultural activities
- ⌘ % of seats held by women in national parliament

Source: UNIFEM's *Progress of the World's Women*, Preview called *Statistics and Indicators*, see: <http://www.unifem.undp.org/progressww/index.html>



Handout: Time use surveys in sub-Saharan Africa

Country	Date	Methodology	Study Unit	Sample size
Nigeria	1998	Participant observation Questionnaire	Women	40
Uganda	1993		Women	
Kenya	1998	Questionnaire	Women	
Botswana	1981	Survey 12 months	Entire household	4600 persons
Kenya	1990		Women	
Kenya	1990	Questionnaire	Household	69
Kenya	1990	Participant observation		
		Survey	Entire household	75 households
Kenya	1990	Participant observation Open-ended interview	Women	44
Senegal	1986	Participant observation Questionnaire	Women	122
Zimbabwe	1992		Households	331
Botswana	1981	Survey	FHH & MHH	
Nigeria	1976	Participant observation Questionnaire	Women	82
Ghana, Botswana, Cameroon	1984			
Kenya	1985	Participant observation	Entire household	115
Cote d'Ivoire	1982	Interview	Women	880
Kenya	1998	Interview	Family	317
Nigeria	1982	Interview	Household	69
Kenya	1989	Participant observation	Entire household	260 individuals
Zimbabwe	1991	Interview Direct measure	Household	132
Senegal	1983	Spot observation	Mothers & children	139
Nigeria	1992	Participant observation	Household	429

Source: Budlender, Debbie: Why should we care about unpaid care work? Cape Town, 2002, p. 31.



Handout: Case study South Africa

One of the first time use surveys in the developing world has been undertaken in South Africa in 2000. Fieldworkers visited 8 564 households and interviewed 14 553 women and men aged ten years or older. Each person interviewed was asked what they did every half-hour between 4 am the day before and 4 am on the morning of the interview. They were asked to report up to three activities for every half-hour period as especially women tend to engage in simultaneous activities which may cause stress. The interviewers filled in the activities in a diary because of the high level of illiteracy, especially among the rural population. Field work was carried out in February, June, and October 2000 due to seasonal variations in time use.

Overall, personal care accounted for the highest share of the daily time. Both women and men spent more than twelve hours per day on average on this activity. The next most common activities for men were social and cultural ones. The next most common activity for women was household maintenance. Men spent more time per day, on average, than women on paid work, and in particular on work in establishments.

Mean minutes per day by activity and sex

	Male	Female
Work in establishments	151	83
Primary production	26	22
Work in non-establishments	13	11
Household maintenance	74	181
Care of person	4	32
Community service	5	3
Learning	109	96
Social and cultural	218	171
Mass media use	112	105
Personal care	727	734
Total	1439	1439

Source: Budlender, D.; Chobokoane, N.; Mpetsheni, Y.: A survey of Time Use – How South African women and men spend their time, Statistics South Africa, 2001



Exercise: Definition of indicators

Please define indicators that are appropriate to monitor progress in view of gender equality and equity in the agricultural sector. Think of available data sources.

Indicator	Data Source
Input	
Output	
Outcome	

MODULE 6

GENDER RESPONSIVE BUDGETING TOOLS AN OVERVIEW



Module 6: Gender Responsive Budgeting Tools – An overview

Objective	To give an overview of different tools of gender responsive budgeting.
Duration	60 minutes
Methods	PowerPoint presentation
Training aids	Multimedia projector
Handouts	Toolkit 1 Toolkit 2 Pre-budget tools of gender responsive budgeting Post-budget tools of gender responsive budgeting

Background information:

The GRB approach does not provide a single blueprint that fits for every context. A range of technical tools for doing gender-responsive budgeting have been proposed for carrying out gender responsive budget analyses. The following list comprises some of the tools that have been proposed by feminist economist Diane Elson, but it does not pretend to be a comprehensive list. There are many more tools and approaches (see for instance Handout: Toolkit 2).

- ⌘ *Gender-Aware Policy Appraisals*: How do policies and programmes reflect women's and men's different needs and priorities?
- ⌘ *Sex-disaggregated Public Expenditure Benefit Incidence Analyses*: How are women and men benefiting from expenditure on public services, e.g. education, health units or agricultural extension services?
- ⌘ *Sex-disaggregated Beneficiary Assessments of Public Service Delivery and Budget Priorities*: How do public investments in infrastructure and the provision of public services address women's and men's different needs and priorities?
- ⌘ *Gender-Aware Public Expenditure Tracking Surveys*: How do allocated funds reach female and male beneficiaries differently?
- ⌘ *Sex-disaggregated Analyses of Budget Impact on Time Use*: How do expenditures impact differently on women's and men's time use?
- ⌘ *Sex-disaggregated Revenue Incidence Analyses*: How are women and men affected differently by the kind of revenues raised by governments such as direct (income, corporate taxes) and indirect taxes (value added tax) or user fees?
- ⌘ *Gender-Aware MTEFs*: How do MTEFs incorporate macroeconomic models with sex-disaggregated variables and the care economy?
- ⌘ *Gender-Aware Budget Statements*: How do governments provide information on their actions to reduce gender inequalities in their annual budget statements?

In general, tools need to be adapted to the respective national or local context. Each initiative needs to choose which tools to apply based on which actors are involved, the nature of the political and budget management systems, and a range of other factors. In addition to technical tools the gender perspective should be integrated in institutionalized routines, such as forms, guidelines, rules for administrative processes, checklists etc.

Further Readings:

☑ Budlender, D.; Sharp, R. with K. Allen: How to do a gender-sensitive budget analysis: contemporary research and practice, 1998.
http://www.bridge.ids.ac.uk/gender_budgets_cd/5-tools.htm#2

☑ Commonwealth Secretariat: Gender Responsive Budgeting Tools.
<http://www.unpac.ca/gender/learnmore.html>

Session guide:

1. Distribute the two handouts Toolkit 1 and 2. Explain that Toolkit 1 has been developed by feminist economist Diane Elson on behalf of the Commonwealth Secretariat and is widely cited internationally, while Toolkit 2 has been developed by the Women's Budget Group in the United Kingdom.
2. Explain the different toolkits. If you deliver only a short training give an interactive power point presentation and explain each of the tools in detail. Discuss the advantages and limits of each tool. Ask participants which stakeholders they think should apply each different tool. If you deliver a longer training, explain the toolkits only briefly. Announce that some of the tools included in toolkit 1 will be explained in more detail in the next modules.
3. Emphasize that these tools are only propositions and that there is no blueprint of how to do gender responsive budgeting. Every gender responsive budgeting initiative has to choose the tool(s) that is/are most appropriate in view of the objectives of the initiative, the skills of actors and the available information and to adapt it/them to the given context.
4. Ask participants which of the tools they consider most useful in their own context and if they can think of other tools based on their daily working experience.
5. If you train researchers specialized in public finance ask them which other tools they apply in doing analysis. Emphasize that they should try to use sex-disaggregated data and present the findings of their analysis in a sex-disaggregated way.



Handout: Toolkit 1

1. **Gender-aware policy appraisals** help analyse policies and programmes funded through the budget from a gender perspective by asking in what ways policies and their associated resource allocations are likely to reduce or increase gender inequalities.
2. **Gender-aware beneficiary assessments of public service delivery and budget priorities** are designed to collect and analyse the opinions of men and women on how far current forms of public service delivery meet their needs and how far current patterns of public expenditure accord with their priorities.
3. **Sex-disaggregated public expenditure benefit incidence analyses** aim at estimating the distribution of budget resources (or changes in resources) among males and females. By this means, the extent to which men and women, girls and boys benefit from expenditure on publicly-provided services can be analysed.
4. **Sex-disaggregated analyses of the impact of the budget on time use** allow the impact of government resource allocation on the amount and the way that time is spent in households to be analysed.
5. **Gender-aware medium-term economic policy framework** incorporates gender variables into models on which medium-term public expenditure planning is based. This might be done by disaggregating variables that refer to people by sex (e.g. labour supply), thus incorporating differentiated roles of men and women in economic activity, or by including new variables to represent the unpaid care economy.
6. **Sex-disaggregated revenue incidence analyses** focus on the different effects on women and men produced by the kind of revenues raised by governments (direct/indirect taxes, user fees, etc.).
7. **Gender-aware budget statements** review the budget from a gender perspective and summarize its implications for gender equality with different indicators.

Sources: Budlender, D., Sharp, R. and Allen, K.: How to Do a Gender-sensitive Budget Analysis: contemporary research and practice, Canberra: Australian Agency for International Development and London: Commonwealth Secretariat, 1998; Elson, D.: Gender Budget Initiative Tools, London: Commonwealth Secretariat, 1999



Handout: Toolkit 2

	Questions explored	Requirements
1. Making gender visible	Who are the recipients?	Data disaggregated by sex
2. Auditing revenue and expenditure	How is spending/revenue distributed between women and men?	Expenditure and revenue statistics disaggregated by sex
3. Gender impact assessment	<p>What are the implications in the long and short term for the gender distribution of:</p> <ul style="list-style-type: none"> - Resources (money and time) - Paid and unpaid work <p>Is provision adequate to the needs of women and men?</p> <p>How does policy affect gender norms and roles?</p>	<p>Data on the unpaid, caring economy (i.e. a satellite account incorporating time-use data)</p> <p>Micro-analytic mode of income distribution incorporating model of economic (e.g. labour supply) and other (e.g. fertility) behaviour sensitive to gender differentials.</p> <p>Sensitivity to gender segregation, cultural practices and gender norms and the impact that policy has on supporting or reconstructing these.</p>
4. Gender Mainstreaming	<p>How is gender taken into account in policy formulation, design and implementation?</p> <p>What priorities are given to reducing gender inequality?</p>	<p>Cooperation across government agencies and across the policy process</p> <p>Awareness of the scope of gender issues and ability to search out more hidden aspects of gender inequality</p> <p>Tools to assess the aims and priorities attached to policy</p>
5. Benchmarking	Are specific targets for gender equality being met?	<p>Awareness of complexity of gender inequalities when setting targets</p> <p>Ability to locate the policy and other influences on particular social phenomena</p>

Source: Rake, K.: Introducing a Human Dimension to the Economy: Engendering the Budget 2001



Handout: Pre-budget tools of gender responsive budgeting

The approach of Gender Responsive Budgeting does not provide a single blueprint that fits for every context. Several technical tools for doing gender-responsive budgeting have been proposed, but they have to be adapted to the respective national or local context. According to the budget management system in a country a combination of the tools may be applied by different actors and at different stages in the budgetary process.

Tool	Questions that can be addressed by the application of this tool
Stage: Preparation of the Budget	
<p>Gender-aware policy appraisals help analyse policies and programmes funded through the budget from a gender perspective by asking in what ways policies and their associated resource allocations are likely to reduce or increase gender inequalities. A policy appraisal should start with a gender-sensitive situation analysis in the given sector. Instruments that can be applied are gender analysis, gender audits and gender impact assessments.</p>	<ul style="list-style-type: none"> ⚡ Are policies and programmes based on a gender-aware situation analysis and do they reflect women’s and men’s different needs and priorities? Is the different time use taken into account? ⚡ Is the intersectoral allocation of resources coherent with policy commitments aiming at reducing poverty and achieving gender equality? ⚡ Is the intra-sectoral allocation of resources coherent with the different needs and priorities of women and men in this sector? ⚡ Are programmes and projects funded through the budget likely to reduce or to increase gender inequalities?
<p>Gender-aware medium-term economic frameworks (MTEF) incorporate gender variables into models on which medium-term public expenditure planning is based. This might be done by disaggregating variables that refer to people by sex (e.g. labour supply, different consumption patterns), thus incorporating differentiated roles of men and women in economic activity, or by including new variables to represent the unpaid care economy.</p>	<ul style="list-style-type: none"> ⚡ Are MTEFs based on macroeconomic models that incorporate sex-disaggregated variables and the care economy?



Handout: Post-budget tools of gender responsive budgeting

Stage: Monitoring and Evaluation	
<p>Sex-disaggregated public expenditure benefit incidence analyses aim at estimating the distribution of budget resources (or changes in resources) among males and females. Benefit incidence can be calculated as the net value of the unit costs multiplied by the number of units utilised by women and men, respectively. By this means, the extent to which men and women, girls and boys benefit from expenditure on publicly-provided services can be analysed.</p>	<p>≠# Are women and men benefiting from expenditure for public services, e.g. education, health units or agricultural extension services, on equal terms?</p>
<p>Gender-disaggregated beneficiary assessments of public service delivery and budget priorities are designed to collect and analyse the opinions of men and women on how far current forms of public service delivery meet their needs and how far current patterns of public expenditure accord with their priorities.</p>	<p>≠# Do these public services address women's and men's different needs and priorities?</p>
<p>Gender-aware public expenditure tracking surveys seek to examine if funds that are earmarked in the budget for a special purpose reach the intended service units. Quantitative data including inputs, outputs, and other characteristics are collected on a sample survey basis directly from the service-providing unit (e.g. school, health station).</p>	<p>≠# Do allocated funds reach female and male beneficiaries equally?</p>
<p>Sex-disaggregated analyses of the impact of the budget on time use analyse the impact of government resource allocation and revenue raising patterns on the amount and the way that time is spent by women and men. Instruments that can be used are Social Accounting Matrixes (SAM) and Computable General Equilibrium (CGE) Models that incorporate the care economy.</p>	<p>≠# Do expenditure and revenue patterns have an impact of women's and men's time use?</p>
<p>Sex-disaggregated revenue incidence analyses focus on the different effects on women and men produced by the kind of revenues raised by governments.</p>	<p>≠# Are women and men affected differently by the kind of revenues raised by governments such as direct (income, corporate taxes) and indirect taxes (value added tax) or user fees?</p>

Adapted from: Budlender, D., Sharp, R. and Allen, K.: How to Do a Gender-sensitive Budget Analysis: contemporary research and practice, Canberra: Australian Agency for International Development and London: Commonwealth Secretariat, 1998; Elson, D.: Gender Budget Initiative Tools, London: Commonwealth Secretariat 1999; Schneider, K.: Negotiating the Economics of PRSs: a Reference Guide for the Non-Economist, OECD/DAC Network on Gender Equality, 2006.

MODULE 7

GENDER AWARE POLICY APPRAISAL



Module 7: Gender Aware Policy Appraisal

Objective	To learn how to appraise a policy document from a gender perspective and to link policies to the budget.
Duration	180 – 360 minutes
Methods	Brainstorming PowerPoint presentation Group work
Training aids	Multimedia projector ZOPP Cards Flip chart Whiteboard
Handouts	Gender-aware policy appraisal Five step approach Checklist for a gender aware agricultural policy appraisal Gender analysis of the budget of the Kenyan Ministry of Agriculture – A case study Analysis of causes and effects
Exercise	Case study on the agricultural sector Gender-aware policy appraisal Role play
Additional material	The most recent sex-disaggregated statistics relevant to the chosen sector Selected excerpts from the PRS, the gender strategy and relevant sector policies Selected excerpts from relevant budget documents

Background information:

Gender-aware policy appraisals analyse policies and programmes funded through the budget from a gender perspective by asking if policies and their associated resource allocations are likely to reduce or increase gender inequalities. The South African Women's Budget Initiative has developed a five step approach for doing a gender aware policy appraisal which is a very useful methodology.

Step 1	Analysis of the situation of women, men, girls and boys in a given sector.
Step 2	Assessment of the extent to which policies address the gendered situation.
Step 3	Assessment as to whether budget allocations are adequate, in order to implement gender-responsive policies.
Step 4	Assessment of short-term outputs of expenditure, in order to evaluate how resources are actually spent, and policies and programmes implemented.
Step 5	Assessment of the long-term outcomes or impact expenditures might have.

Gender aware policy appraisals can be carried out by the concerned line ministry, NGOs, research institutes or academics. The tool can be used for all sectors and at different levels. The tool provides a broad-brush picture which then needs to be followed up with more detailed analysis of identified issues.

Further Readings:

☞ Commonwealth Secretariat: Gender Mainstreaming in Agriculture and Rural Development: A Reference Manual for Governments and Other Stakeholders. Commonwealth Gender Management System Series, London 2001
<http://www.un-instraw.org/training/index.php?fromarea=Resources&showid=284>

Session guide:

1. Distribute the handout “Five Step Approach” and explain the approach. Discuss if this approach is appropriate in the context of the country participants are coming from and which data would be needed.
2. Ask participants to brainstorm about the main gender issues in the agricultural sector of their country (you can easily adapt the following exercises to any other sector you may want to cover in your training). You may distribute the checklist with guiding questions.
3. Ask participants to form working groups. Distribute the exercise “Analysis of causes and effects”. Ask each group to write their findings on flipchart paper and to report back to the plenary. The exercise should help to strengthen participants’ capacity to distinguish between a problem, effects of a problem and underlying causes. Ask participants to think of gender differences in terms of effects, causes and how the problem manifests itself.
4. Distribute a fact sheet containing relevant sex-disaggregated statistics related to the agricultural sector that you have prepared.
5. Distribute an excerpt of the PRS related to the sector you have chosen to cover in your training and the respective sector strategy. Ask participants to form working groups and to discuss if the policies included in the policy documents address the main problems of (poor) women and men identified earlier. Instead, you may want to prepare a short case study such as the one you find on the handout “gender analysis of the budget of the Kenyan Ministry of Agriculture”. Prepare excerpts of the relevant budget documents and ask participants to analyse if policies are reflected in the budget. Obviously, participants will not be able to carry out an in-depth analysis during the limited time of a training course. However, the exercise aims at sensitising participants for gender issues related to policies and budgets and should enable them to later carry out a more detailed analysis by their own.
6. If time allows you may want to carry out the role play which may also be used in module 13.



Handout: Gender-aware policy appraisal

Aim	To analyse policies and programmes funded by the budget from a gender perspective by asking in what ways policies and their associated resource allocations are likely to reduce or increase gender inequalities.
Key Questions	<p>Are policies and programmes likely to reduce or enhance gender inequalities and imbalances?</p> <p>Do budgetary allocations follow policy commitments on gender equality?</p>
Methods	Five-step approach developed by the South African Women's Budget initiative
Actors	Concerned line ministries, NGOs, research institutes
Data Requirements	<p>Steps one to three can be carried out on the basis of policy and budget documents.</p> <p>Steps four and five might require considerable fieldwork and include the application of other tools.</p>
Sectors	The tool can be applied to every sector. The South African Women's Budget Initiative has carried out policy analyses of all 27 votes of the national budget.
Weakness/Constraint	The analytical approach operates at a relatively aggregated level. Therefore, it can only provide a broad-brush picture which then needs to be followed up with more detailed analysis of identified issues.



Handout: Five step approach

One of the most prominent gender responsive budget initiatives – the South African Women’s Budget Initiative⁶ – has developed a five step methodology for analysing the budget from a gender perspective. It is especially suitable in contexts of performance budgeting or results based systems as the different steps described below go hand in hand with their logic.

Step 1: Analysing the situation of women, men, girls and boys

Step 2: Assessing the gender-responsiveness of policies (**activities**)

Step 3: Assessing budget allocations (**inputs**)

Step 4: Monitoring spending and service delivery (**outputs**)

Step 5: Assessing **outcomes**

Source: Budlender, D.; Hewitt, G.: Engendering Budgets, 2003, p. 90.

⁶ Although the initiative is named „Women’s Budget Initiative” it looks at both, women and men, girls and boys.



Handout: Checklist for a gender aware agricultural policy appraisal

1. Situation Analysis

Poverty Profile

Socio-economic characteristics, different dimensions of poverty

How much percent of households are headed by women?

Was a PPA undertaken to give women and men a voice concerning their priorities and needs?

What are the main constraints of women to overcome poverty?

Activity profile

Who does what, where, when and for how long (productive, reproductive and community related roles)?

Are women active both in subsistence and cash crop production?

Are women active in livestock production?

What tasks do women and men perform (seed or cutting selection, land preparation, planning or seeding, weeding, etc.)?

Are tasks shared by women and men or carried out only by one sex?

Access to and control Profile (Who has what?)

Who has access to and control over productive resources such as land, capital, and agricultural inputs?

Who has access to human capital resources such as training opportunities and extension services?

Who has access to new technologies?

Who has access to markets?

How do women and men differ in the constraints they face, and how do these differences affect their work, their productivity, and access to benefits?

Are women and men paid different wages?

Time Use

How much time is spent by women and men on different activities?

2. Gender and Agricultural Policy

Does government policy on agriculture:

- Incorporate equity and equality measures for women in agriculture, taking into account their interests, needs and priorities?
- Recognise differences between women and men farmers?
- Recognise differences in needs and priorities of women farmers from different categories of households, agriculture sub-sectors and agro-economic zones?
- Explore local level resource allocation?

Are women and men equally involved in the development of the policy:

- at ministerial level
- at the level of agricultural extension
- at research level
- at the level of rural farming communities

Has the government taken steps to review and amend existing policies of the Ministry of Agriculture to include an explicit acknowledgement of the role of the Ministry and its agencies in advancing gender equality and equity in agriculture?

What steps have been taken to ensure that projects/programmes reflect the needs, interests and priorities of both women and men in agriculture?

What measures have been taken by the government to develop rural based agro-industries and entrepreneurs, to improve the agricultural productivity of women beneficiaries, including through the production of marketable quality products, and to enable them to undertake profitable economic enterprises and increase their income?

What concrete actions have been taken to increase women's access to information, institutional credit and other agricultural inputs to increase their productivity and income?

What measures have been taken to increase the availability of sex-disaggregated data in the Ministry of Agriculture and related agencies including extension departments, NGOs and research institutes?

3. Agricultural Extension Policy:

- Are extension services equally available to female and male beneficiaries?
- Do female and male beneficiaries have open access at all levels of extension services? Is there any conflict between policy and cultural practices with regard to taking advantage of such access?
- Is there any conflict between policy and cultural practices with regard to participation of female/male farmers at production level?
- Have technical resource persons received training in gender analysis/planning? Do the curricula of agriculture education programmes reflect the importance of this issue in the preparation of extension workers for work at village level?
- What is the nature of the financial support provided for extension? Is it government-supported, cost-sharing or privately funded?
- How is resource use determined? Are there mechanisms in place for monitoring gender policy?
- With respect to agriculture-related work, how does the distribution of economic resources and power, both within households and in the wider society, impact on the life conditions and economic and social roles of women and men?

Adapted from: Commonwealth Gender Management System Series: Gender Mainstreaming in Agriculture and Rural Development: A Reference Manual for Governments and Other Stakeholders



Handout: Gender analysis of the budget of the Kenyan Ministry of Agriculture – A case study

Kenya's economy is heavily dependent on agriculture as the leading export earner and the employer of over 80% of the labour force. It is estimated that the sector directly contributes about 28% to the GDP, while another 27% of GDP is generated through linkages with other sectors such as transport and manufacturing. Tea, coffee and horticultural crops account for more than half of the country's export earnings. About 80% of the Kenyan population live in rural areas, and about 75% derive their income from agriculture.

Kenya's agriculture is dominated by smallholder mixed farming, comprising livestock rearing such as sheep, goats and poultry, and food (subsistence) crops such as maize, rice, potatoes, beans, wheat, sorghum and a variety of vegetables. The structure of the agricultural sector is highly dualistic, consisting of a traditional sector and a commercial one which includes both large-scale farming and smallholder production. It is estimated that there are more than 3 million smallholder farms, which are the main producers of subsistence and cash crop farming.

Agriculture and rural development were ranked highest by the poor during the consultation process for the PRSP. Low agricultural productivity was cited by many communities as being one of the major causes of poverty.

This is in line with findings of the qualitative Kenyan Poverty Impact Monitoring (KePIM) saying that low levels of production were claimed by subsistence farmers in a number of districts as causing poverty. One of the major impediments to overcoming poverty was felt to be the lack of access to agricultural extension services. Among other causes, in a number of PPA surveys carried out in the 1990s the poor attributed their poverty to traditions and cultural beliefs that deny women access to productive assets. As women especially lack access to complementary inputs such as capital, appropriate technology and extension services, their productivity remains lower than potential. A study undertaken by Saito et al. in 1994 found a 10% increase in the family female labour input increases output by 2.4%, compared with only 1.5% for a 10% increase of male family labour. Moreover, the elasticity of male family labour ranked only fourth after female family labour, capital, and fertilizer. Another study by Saito and Spurling showed that yields obtained by women farmers in Kenya could increase by more than 20% if they were given the same level of agricultural inputs and education as men farmers.

Recurrent Budget of Vote 10

The recurrent budget of the Ministry of Agriculture contains expenses for personnel emoluments, operation and maintenance, plant and equipment, and transfers. It is structured into seven sub-votes, namely General Administration and Planning, Regulatory Management of Inputs and Outputs in Agriculture, Promotion of Agriculture Sector Development, Facilitation and Supply of Agriculture and Extension Research, Information Management for Agriculture, Monitoring and Management of Food Security, Crop and Pest Control, and Protection of Natural Base for Agriculture.

SUMMARY OF VOTE 10 - MINISTRY OF AGRICULTURE AND LIVESTOCK DEVELOPMENT

	APPROVED 2000/01 FY 2000/01	APPROVED 2001/02 FY 2001/02	APPROVED 2002/03 FY 2001
PE ¹	2,135,855,446	1,968,011,598	2,038,714,786
OTHER PE	959,307,774	1,407,539,094	1,482,313,068
OPERATION	1,129,399,143	1,099,968,945	1,426,949,679
PLANT & EQUIPMENT	28,851,907	28,501,969	31,591,464
MAINTENANCE	78,482,471	80,581,601	108,534,068
TRANSFERS	1,543,982,995	2,076,982,853	1,888,332,325
TOTAL	5,875,879,736	6,661,586,060	6,976,435,390
AIA ²	337,769,510	349,670,350	344,920,420

¹ PE = Personnel Emoluments

² AIA = Appropriations in Aid

SUMMARY OF VOTE 10 - MINISTRY OF AGRICULTURE AND LIVESTOCK DEVELOPMENT (PERCENTAGE OF TOTAL VOTE)

	APPROVED 2000/01 FY 2000/01	APPROVED 2001/02 FY 2001/02	APPROVED 2002/03 FY 2001
PE	36.35	29.59	29.22
OTHER PE	16.33	21.13	21.25
OPERATION	19.22	16.51	20.45
PLANT & EQUIPMENT	0.49	0.43	0.45
MAINTENANCE	1.34	1.21	1.56
TRANSFERS	26.28	31.18	27.07
TOTAL	100.00	100.00	100.00

The allocation of funds according to sub-votes is as follows:

	Name of the Sub-vote category	Approved Recurrent Vote 10 (2002/2003)	Percentage of the total
Sub-vote 100	General Administration	340,240,836	5.29%
Sub-vote 101	Regulatory Management of Inputs and Outputs in Agriculture and Livestock	618,491,801	9.61%
Sub-vote 102	Promotion of Agriculture and Livestock Private Sector Development	400,500,452	6.23%
Sub-vote 103	Facilitation and Supply of Agriculture and Livestock Extension Services and Extension Research	2,287,623,117	35.60%
Sub-vote 104	Information Management for Agriculture and Livestock Sector	1,465,887,907	22.79%
Sub-vote 105	Monitoring and Management of Food Security	4,056,940	0.06%
Sub-vote 106	Crop and Livestock Diseases and Pest Control	878,428,917	13.66%
Sub-vote 107	Protection of Natural Resource Base for Agriculture and Livestock	436,810,141	6.79%
Total		6,432,040,111	100%

Development Budget of Vote 10

DEVELOPMENT VOTE		2002/2003		
		GROSS	AIA	NET
GENERAL ADMINISTRATION				
Sub-vote 100				
190	HQ ADMINISTRATIVE AND TECHNICAL SERVICES	22,690,136	-	
192	WESTERN KENYA DISTRICT-BASED AGRICULTURAL DEVELOPMENT PROJECTS	21,615,643	-	
193	DEVELOPMENT PLANNING	26,214,005	21,633,505	
	SUBTOTAL	70,519,784	21,633,505	48,886,279
REGULATORY MANAGEMENT OF INPUTS AND OUTPUTS IN AGRICULTURE AND LIVESTOCK				
Sub-vote 101				
407	ANIMAL PRODUCTION FARMS	16,120,000		
481	VETERINARY INVESTIGATION LABORATORY SERVICES	10,517,293		
490	VETERINARY FARMS DEVELOPMENT	7,175,000		
	SUBTOTAL	33,812,293		33,812,293
PROMOTION OF AGRICULTURE AND LIVESTOCK PRIVATE SECTOR DEVELOPMENT				
Sub-vote 102				
237	CROP PRODUCTION	110,000,000	105,000,000	
238	HEADQUARTERS HORTICULTURAL CROP PRODUCTION SERVICES	211,835,876	90,971,760	
463	PASTORAL AREAS TRAINING CENTRE - NAROK			
465	GRIFTU PASTORAL TRAINING CENTRE	1,100,000		
532	FISHERIES	18,500,000		
533	RESOURCE MANAGEMENT NATIONAL PROGRAMME	20,330,000		
534	FISHERIES STATIONS	32,490,000		
537	FISHERIES RESEARCH AND HATCHERY STATIONS	5,500,000		
995	NATIONAL IRRIGATION BOARD	49,460,000	24,960,000	
996	BURA IRRIGATION SCHEME	11,000,000		
	SUBTOTAL	460,215,876	220,931,760	239,284,116

FACILITATION AND SUPPLY OF AGRICULTURE AND LIVESTOCK EXTENSION SERVICES AND EXTENSION RESEARCH				
Sub-vote 103				
193	DEVELOPMENT PLANNING SERVICES	180,766,495	164,766,495	
225	CENTRAL KENYA DRY AREAS AND SMALLHOLDER COMMUNITY SERVICES	51,506,600		
241	INTEGRATED AGRICULTURAL DEVELOPMENT PROGRAMME	1,486,553		
246	SOIL AND WATER CONSERVATION (NALEP)	171,000,000	82,000,000	
260	FARMERS' TRAINING CENTRES	6,974,172		
271	NATIONAL EXTENSION PROJECT	16,834,800	500,000	
408	RURAL DAIRY SERVICES	121,890,751	80,813,000	
424	NATIONAL DAIRY DEVELOPMENT PROJECT	62,714,284	57,214,284	
	SUBTOTAL	613,173,655	385,293,779	227,879,876
INFORMATION MANAGEMENT FOR AGRICULTURE AND LIVESTOCK SECTOR				
Sub-vote 104				
259	BUKURA INSTITUTE OF AGRICULTURE	3,500,000		
261	KILIFI INSTITUTE OF AGRICULTURE	3,000,000		
467	AHITI NDOMBA	200,000		
468	AHITI NYAHURURU	150,000		
471	AHITI KABETE	600,000		
472	MEAT TRAINING SCHOOL - ATHI RIVER	1,000,000		
473	DAIRY TRAINING SCHOOL - NAIVASHA	1,000,000		
642	KENYA TRYPANOSOMIASIS RESEARCH INSTITUTE	8,631,520		
645	KENYA MARINE AND FISHERIES RESEARCH INSTITUTE	12,500,000		
759	KENYA AGRICULTURAL RESEARCH INSTITUTE	531,191,659	381,800,000	
760	SOIL AND WATER MANAGEMENT RESEARCH	42,401,420	39,395,420	
761	NATIONAL HORTICULTURAL RESEARCH PROJECT	122,800,785		
763	VETERINARY RESEARCH	7,463,516		
764	RANGE AND ARID LAND	28,804,580	28,804,580	

	RESEARCH			
765	ANIMAL PRODUCTION RESEARCH	20,582,988	-	
	SUBTOTAL	783,826,468	450,000,000	333,826,468
	MONITORING AND MANAGEMENT OF FOOD SECURITY			
	Sub-vote 105			
491	ASAL DEVELOPMENT PROJECTS	95,975,034	94,000,000	
508	GRAIN STORAGE AND HANDLING	500,000,000	-	
	SUBTOTAL	595,975,034	94,000,000	501,975,034
	CROP AND LIVESTOCK DISEASES AND PEST CONTROL			
	Sub-vote 106			
447	TSETSE CONTROL SERVICES	6,179,938	-	
448	DISEASE AND PEST CONTROL SERVICES	125,670,200	117,500,000	
	SUBTOTAL	131,850,138	117,500,000	14,350,138
	PROTECTION OF NATURAL RESOURCE BASE FOR AGRICULTURE AND LIVESTOCK			
	Sub-vote 107			
250	IRRIGATION DEVELOPMENT	12,778,000	12,000,000	
451	RANGE MANAGEMENT AND IMPROVEMENT	13,228,760	12,162,500	
	SUBTOTAL	26,006,760	24,162,500	1,844,260
	TOTAL	3,506,093,978	1,991,066,188	1,515,027,790

Source: Study "Gender Responsiveness of the Budget of the Ministry of Agriculture", undertaken by the PRSP/MTEF-Secretariat Kenya with support from GTZ



Exercise: Analysis of causes and effects

1. Use the social relations framework to analyse causes and effects of low productivity of female farmers.
2. Prepare to report your findings back to the plenary.

Immediate, underlying and structural causes

Analysing causes and effects	
Long-term effects	
Intermediate effects	
Immediate effects	
THE CORE PROBLEM	LOW PRODUCTIVITY OF FEMALE FARMERS
Immediate causes at -household -community -market and/or -state	
underlying causes at -household -community -market and/or -state	
Structural causes at -household -community -market and/or -state	



Exercise: Case study on the agricultural sector

1. Please identify the most important gender issues in the agricultural sector in your country.
2. What are the causes of the gender gaps in the agricultural sector?
3. How does the agricultural sector policy reflect the gender gaps in the agricultural sector and what are the planned policy actions?

	Main problems in respect of agricultural achievements	Causes of these problems	Policy actions addressing problems and root causes
Girls			
Women			
Boys			
Men			



Exercise: Gender-aware policy appraisal

1. Please outline a situation analysis with regard to agriculture. What kind of data do you need? Which data are available/missing?
2. Please summarize the intervention areas of the agricultural policy of the government. Are the planned activities in line with your findings in the situation analysis? Do you think the policy approach will be effective in addressing main issues in agriculture?
3. Are budget allocations in line with policy commitments?
4. Which alternative policy interventions and budget allocations would you propose?



Exercise: Role play

Role 1:

You are employed as a **gender expert in the Gender Equity Mobilisation Support Unit in the Ministry of Agriculture**. The PRSP/MTEF Secretariat of the Ministry of Finance and Planning has launched a programme on “Gender Mainstreaming in the National Budget and in Macro and Sectoral Economic Policies” and has asked you to make a statement on the gender responsiveness of the budget of the Ministry of Agriculture and to elaborate propositions for a re-allocation of resources to achieve greater gender equality.

- ⚡ Please draft a short statement based on the background information below.
- ⚡ Prepare a strategy that you will pursue in a role play with other stakeholders to convince them of your propositions with respect to a more gender-equitable re-allocation. Please remember the role you are playing (mandate, constraints etc.).
- ⚡ Identify the information you would need to make a more in-depth statement.
- ⚡ Identify the skills you would need to make a qualified statement.

Role 2:

You are employed as an **officer in the budget department of the Ministry of Agriculture**. The PRSP/MTEF Secretariat of the Ministry of Finance and Planning has launched a programme on “Gender Mainstreaming in the National Budget and in Macro and Sectoral Economic Policies” and has asked the Minister of Agriculture to deliver a speech on the gender responsiveness of the budget of the Ministry of Agriculture. You have been assigned to draft this speech.

- ⚡ Please draft a short speech based on the background information below.
- ⚡ Prepare a strategy that you will pursue in a role play with other stakeholders to convince them of your findings. Please remember the role you are playing (mandate, constraints etc.).
- ⚡ Identify the information you would need to make a more in-depth statement.
- ⚡ Identify the skills you would need to make a qualified statement.

Role 3:

You are a **journalist** and have been asked by the editor in chief of your journal to write a critical article about the gender responsiveness of the budget of the Ministry of Agriculture in connection with the new programme on “Gender Mainstreaming in the National Budget and in Macro and Sectoral Economic Policies” launched by the PRSP/MTEF Secretariat of the Ministry of Finance and Planning.

- ⚡ Please draft a short article based on the background information below.
- ⚡ Prepare a strategy that you will pursue in a role play with other stakeholders to defend the statements made in your article. Please remember the role you are playing (mandate, constraints etc.).
- ⚡ Identify the information you would need to make a more in-depth statement.
- ⚡ Identify the skills you would need to make a qualified statement.

Role 4:

As a **female member of the budget committee of parliament** you have been asked to make a statement on the gender responsiveness of the budget of the Ministry of Agriculture and to elaborate propositions for a re-allocation of resources to achieve greater gender equality.

- ⚡ Please draft a short article based on the background information below.
- ⚡ Prepare a strategy that you will pursue in a role play with other stakeholders to defend the statements made in your article. Please remember the role you are playing (mandate, constraints etc.).
- ⚡ Identify the information you would need to make a more in-depth statement.
- ⚡ Identify the skills you would need to make a qualified statement.

Role 5:

You are working as an **economist in an independent research organisation**. You have been asked by a women’s organisation to write a statement on the budget of the Ministry of Agriculture. The results and your propositions will be used by the women’s organisation for lobbying and advocacy purposes aiming at the achievement of greater gender equality.

- ⚡ Please draft a short statement based on the background information below.
- ⚡ Prepare a strategy that you will pursue in a role play with other stakeholders to defend the statements you have made. Please remember the role you are playing (mandate, constraints etc.).
- ⚡ Identify the information you would need to make a more in-depth statement.
- ⚡ Identify the skills you would need to make a qualified statement.

Role 6:

You are the **Minister of Gender, Sport and Culture**. The PRSP/MTEF Secretariat of the Ministry of Finance and Planning has launched a programme on “Gender Mainstreaming in the National Budget and in Macro and Sectoral Economic Policies” and you have been asked to make a statement on the gender responsiveness of the budget of the Ministry of Agriculture and to elaborate propositions for a re-allocation of resources to achieve greater gender equality.

- ⚡ Please draft a short statement based on the background information below.
- ⚡ Prepare a strategy that you will pursue in a role play with other stakeholders to convince them of your propositions with respect to a more gender-equitable re-allocation. Please remember the role you are playing (mandate, constraints etc.).
- ⚡ Identify the information you would need to make a more in-depth statement.
- ⚡ Identify the skills you would need to make a qualified statement.

Role 7:

You are employed in the **office of the Auditor General**. The PRSP/MTEF Secretariat of the Ministry of Finance and Planning has launched a programme on “Gender Mainstreaming in the National Budget and in Macro and Sectoral Economic Policies” and you have been asked to make a statement on the gender responsiveness of the budget of the Ministry of Agriculture.

- ⚡ Please draft a short statement based on the background information below.
- ⚡ Prepare a strategy that you will pursue in a role play with other stakeholders to defend your findings. Please remember the role you are playing (mandate, constraints etc.).
- ⚡ Identify the information you would need to make a more in-depth statement.
- ⚡ Identify the skills you would need to make a qualified statement.

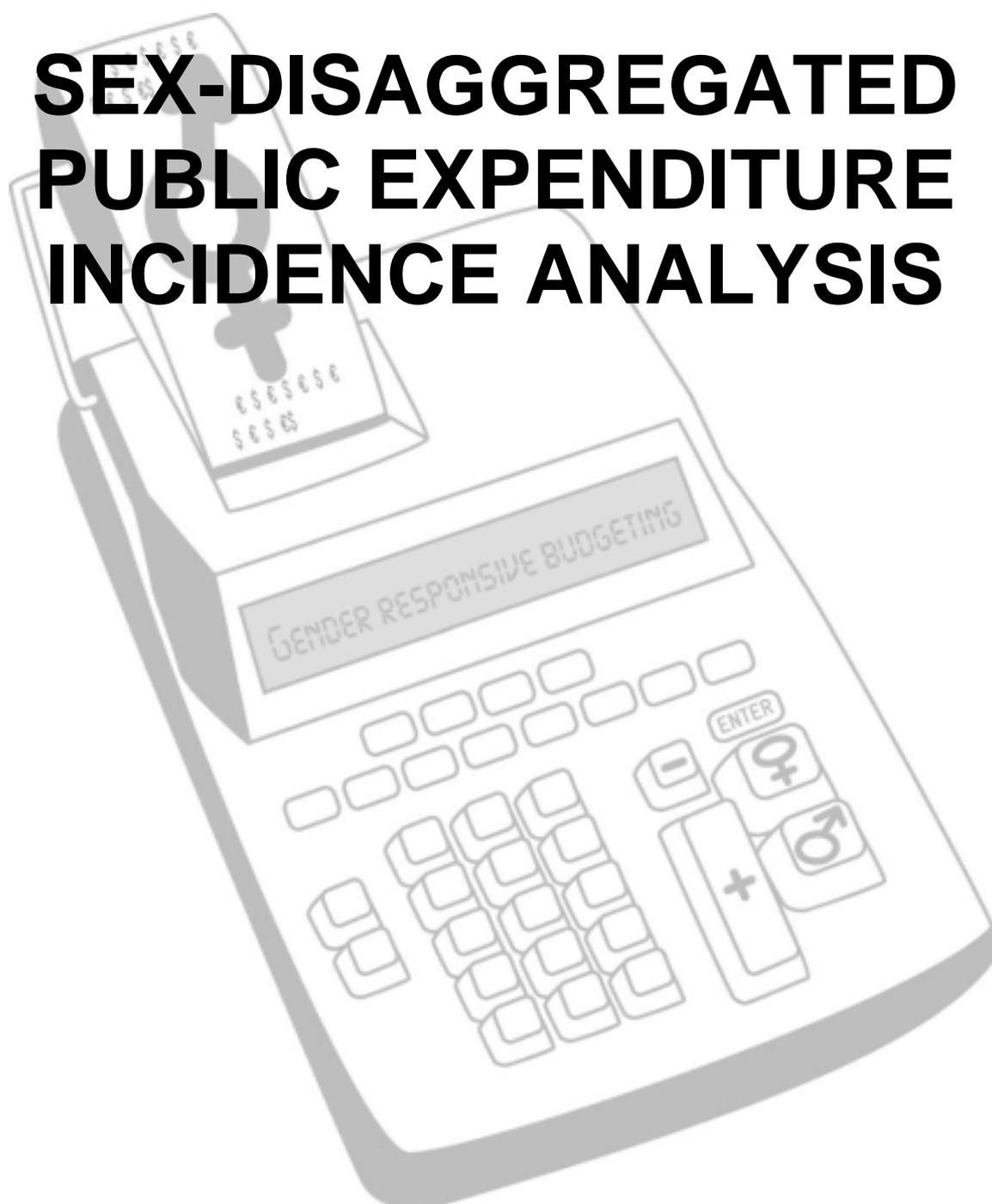
Role 8:

You are a **member of an active women's rights NGO**. You just came back from a field visit to a remote area where mainly female farmers try to make a living and thus ensure the survival of their families. They are not allowed to own land and do not have access to modern technology and extension services. Therefore, their productivity is very low. You have agreed with the other members of the NGO to analyse the gender responsiveness of the budget of the Ministry of Agriculture and to lobby for a re-allocation of resources to achieve greater gender equality in the agricultural sector.

- €# Please draft a short analysis based on the background information below.
- €# Prepare a strategy that you will pursue in a role play with other stakeholders to convince them of your propositions with respect to a more gender-equitable re-allocation. Please remember the role you are playing (mandate, constraints etc.).
- €# Identify the information you would need to make a more in-depth statement.
- €# Identify the skills you would need to make a qualified statement.

MODULE 8

SEX-DISAGGREGATED PUBLIC EXPENDITURE INCIDENCE ANALYSIS



Module 8: Sex-disaggregated Public Expenditure Incidence Analysis

Objective	To introduce the tool sex-disaggregated public expenditure incidence analysis.
Duration	90 minutes – 360 minutes (depending from the target group)
Methods	Lecture/PowerPoint Presentation Group work Computer-based calculation exercises (for researchers)
Training aids	Multimedia projector Flipchart Computer
Handouts	Sex-disaggregated public expenditure benefit incidence analysis Benefit Incidence case study: Ivory Coast
Exercise	Sex-disaggregated public expenditure benefit incidence analysis
Additional material	For computer calculations: necessary statistical data

Background information:

Sex-disaggregated public expenditure incidence analysis (or, in short, benefit incidence analysis) is a standard tool for public expenditure analysis that describes the distributional consequences of public spending. It asks who benefits from public expenditures in a given sector. In general, benefit incidence analysis is a powerful instrument to sensitize government officials and policy makers for gender inequalities. However, one has to be aware of the limitations of this tool when analyzing results.

The benefit incidence is calculated by the following three steps methodology:

1. Estimation of the unit cost of providing a particular service (proceeds of cost recovery measures have to be subtracted). The unit costs are calculated by the total amount of officially reported public spending on the service in question⁷ divided by the total number of units provided.
2. Unit costs are imputed to households that are identified as users of the service (e.g. through household income or expenditure surveys, Living Standards Measurement Surveys) and multiplied by the number of units consumed by the household.
3. Aggregated estimates of benefit incidence are obtained in groups ordered by different variables.

$$\frac{(\text{annual total costs of public provision of service}) - (\text{proceeds of cost recovery measures, i.e. user charges})}{(\text{annual number of units of the service provided})}$$

Most benefit incidence analyses define groups based on their poverty status (poor/non-poor) or their welfare status (usually measured by quantile of the per capita household expenditure distribution). Some look at differences related to geographic location (urban/rural), ethnicity or age cohort. Rare are studies that highlight gender differences in benefit incidence of public spending.

Benefit incidence analyses can only be applied on sectors where individual users can be identified, but not for sectors providing public goods (e.g. security, large scale infrastructure, street lighting). Most benefit incidence studies focus on education, health services, and water and sanitation. Others focus on direct income transfers, social security benefits, public employment or agricultural services. It is estimated that around 1/3 of the total budget can be analyzed by benefit incidence analyses.

The following table shows the results of a sex-disaggregated benefit incidence analysis of the education sector in the Ivory Coast. It has to be read as follows:

⁷ Drawing on budgets at highly aggregated levels such as regions, provinces, or even the nation means that the costs attributed to the services received by any individual reflect a broad average rather than the specific cost for her/his service. It has also be kept in mind that the difference between what is budgeted and what actually reaches recipients may be substantial due to administrative inefficiencies or corruption (see module on public expenditure tracking surveys).

The row shares show the distribution of benefits for females and males in one income quintile or region respectively. By comparing different income quintiles (1 is the poorest, 5 the richest quintile) it becomes visible that gender differences in benefit incidence of public expenditure on education are largest in the poorest income quintile and higher in rural areas than in urban areas. The table also provides information on which income groups benefit most from spending on different primary, secondary and tertiary education. In total, males in the poorest quintile gained 16 percent of the education subsidy accruing to their gender group, but females only received 9 percent of theirs. The richest female group appropriated 37 percent of the education subsidy received by the female population. Gender inequality, therefore, was a critical component of overall inequality in the benefit incidence of education spending in the Ivory Coast.

Table: Ivory Coast, Benefit Incidence of Education Spending by Gender, Region and Quintile, 1995

Quintile/ region	Female				Male				Total			
	Subsidy	Per	Row	Column	Subsidy	Per	Row	Column	Subsidy	Per	Column	
	M CFAF	CFAF	%	%	M CFAF	CFAF	%	%	M CFAF	CFAF	%	
<i>Primary</i>												
1	5,993	4,564	30.5	14.0	13,679	8,912	69.5	22.8	19,672	6,908	19.1	
2	10,135	6,900	47.0	23.7	11,443	8,265	53.0	19.1	21,578	7,562	21.0	
3	10,391	7,162	42.3	24.3	14,162	10,267	57.7	23.6	24,553	8,676	23.9	
4	9,018	6,414	39.7	21.1	13,718	9,371	60.3	22.9	22,736	7,922	22.1	
5	7,294	5,433	51.0	17.0	7,008	4,643	49.0	11.7	14,301	5,015	13.9	
Côte d'Ivoire	42,831	6,135	41.6	100.0	60,009	8,252	58.4	100.0	102,840	7,215	100.0	
Rural	21,801	5,591	38.3	50.9	35,061	7,960	61.7	58.4	56,862	6,848	55.3	
Urban	21,029	6,824	45.7	49.1	24,948	8,701	54.3	41.6	45,977	7,728	44.7	
<i>Secondary (including technical)</i>												
1	1,044	795	30.4	4.2	3,112	2,028	90.6	6.8	3,433	1,206	5.2	
2	4,609	3,138	33.2	18.4	9,751	7,043	70.2	21.2	13,882	4,865	20.9	
3	3,656	2,520	35.8	14.6	6,923	5,019	67.7	15.1	10,224	3,613	15.4	
4	3,127	2,224	36.5	12.5	6,252	4,271	72.9	13.6	8,572	2,987	12.9	
5	12,565	9,359	41.6	50.3	19,896	13,181	65.8	43.3	30,227	10,599	45.6	
Côte d'Ivoire	25,001	3,581	37.7	100.0	45,933	6,317	69.2	100.0	66,335	4,654	100.0	
Rural	3,146	807	19.0	12.6	14,095	3,200	85.0	30.7	16,578	1,996	25.0	
Urban	21,855	7,092	43.9	87.4	31,838	11,103	64.0	69.3	49,759	8,364	75.0	
<i>Tertiary (including technical)</i>												
1	0	0	0.0	0.0	4,650	3,030	100.0	17.4	4,650	1,633	12.3	
2	0	0	0.0	0.0	856	618	100.0	3.2	856	300	2.3	
3	550	379	50.0	5.0	550	399	50.0	2.1	1,100	389	2.9	
4	877	624	20.0	7.9	3,506	2,542	80.0	13.1	4,384	1,528	11.6	
5	9,658	7,194	36.0	87.1	17,169	11,375	64.0	64.2	26,827	9,407	70.9	
Côte d'Ivoire	11,085	1,588	29.3	100.0	26,732	3,676	70.7	100.0	37,817	2,653	100.0	
Rural	0	0	0.0	0.0	8,151	1,851	100.0	30.5	8,151	982	21.6	
Urban	11,085	3,597	37.4	100.0	18,581	6,480	62.6	69.5	29,666	4,987	78.4	
<i>All education</i>												

1	7,037	5,359	24.7	8.9	21,440	13,970	75.3	16.2	28,477	10,000	13.5
2	14,745	10,038	40.1	18.7	22,050	15,927	59.9	16.6	36,794	12,895	17.4
3	14,596	10,062	40.3	18.5	21,635	15,685	59.7	16.3	36,231	12,802	17.1
4	13,023	9,262	35.7	16.5	23,477	16,957	64.3	17.7	36,499	12,718	17.2
5	29,517	21,985	40.1	37.4	44,072	29,199	59.9	33.2	73,589	25,803	34.8
Côte d'Ivoire	78,917	11,304	37.3	100.0	132,674	18,245	62.7	100.0	211,591	14,845	100.0
Rural	24,947	6,398	30.3	31.6	57,307	13,011	69.7	43.2	82,254	9,906	38.9
Urban	53,970	17,513	41.7	68.4	75,367	26,284	58.3	56.8	129,337	21,740	61.1

Source: Demery, Lionel: Benefit incidence: a practitioner's guide, Poverty and Social Development Group, Africa Region, The World Bank, July 2000.

Shifting spending from tertiary towards primary and secondary schooling to improve the share of the total budget going to females (as well as to poorer groups in the community) could be one of the policy implications of the sex-disaggregated benefit incidence analysis. However, benefit incidence analysis does not provide any information on private school enrollment and on household behaviour. If enrollment rates of girls would increase due to higher spending on primary education depends on many other factors, such as time use of girls, their parents attitude towards girls school enrollment, the distance to schools etc. The interpretation of the findings, thus, necessitates a good understanding of the given country context.

Other shortcomings of benefit incidence analysis have been stated:

- There are inherent problems in assigning collectively consumed benefits of government provided goods and services to specific households and individuals within households.
- Benefit incidence analysis does not account for the difference between measuring the financial cost of providing a service and measuring its social impact (e.g., not acknowledging the social benefits = externalities of educating women).
- It does not provide any indication of differences in women's and men's needs and their respective requirements for particular services.

Source: Budlender, Sharp, Allen, 1998, p. 46

In general, benefit incidence analysis is a powerful instrument to sensitize government officials and policy makers for gender inequalities. However, one has to be aware of the limitations of this tool when analyzing results.

Benefit incidence reveals the problems, but only provides some indication of where the answers lie. It needs to be complemented with more-in-depth study of the underlying behavioural relationships. (Lionel Demery, 1996)

Further Readings:

Demery, Lionel: Gender and Public Spending: Insights from Benefit Incidence.
<http://www.eldis.org/static/DOC7364.htm>

☞ Demery, Lionel: Benefit incidence: a practitioner's guide, Poverty and Social Development Group, Africa Region, The World Bank, July 2000.

http://www-wds.worldbank.org/servlet/WDS_IBank_Servlet?type=AllWords&ptype=sSrch&pcont=results&sortby=D&sortcat=D&all=Demery

☞ Glick, Peter; Saha, Rumki; Younger, Stephen D.: Integrating Gender into Benefit Incidence and Demand Analysis, May 2004.

http://papers.ssrn.com/sol3/papers.cfm?abstract_id=590822

Session guide:

1. Introduce the tool sex-disaggregated public expenditure incidence analysis.
2. Carrying out a large-scale benefit incidence analysis necessitates a huge amount of data. Therefore, this kind of analysis is mainly executed by economic research institutes or Ministries of Finance and Planning. If you train these groups and they are familiar with computer based statistical programmes you may think of carrying out computer based calculation exercises to enable participants of your training to do this kind of research by their own.
3. Other target groups, such as NGOs, media etc. should be enabled to interpret findings of benefit incidence analysis. You could distribute the handout “benefit incidence case study” and ask them to interpret the results and discuss the limitations of this kind of analysis.
4. It is important that you highlight the necessity to collect and analyse data in a sex-disaggregated way by referring to the example given in the background information. You find other examples in the further readings material.
5. Ask participants to form working groups, distribute the exercise “sex-disaggregated benefit incidence analysis”, and ask participants to carry out the exercise. Allow for sufficient time for reporting back to the plenary and discussion.



Handout: Sex-disaggregated public expenditure benefit incidence analysis

Aim	To analyse the extent to which men and women, girls and boys, benefit from expenditure on publicly provided services.
Question	How are the benefits of public spending distributed among women and men, girls and boys?
Method	<p>Three step approach:</p> <ul style="list-style-type: none"> - estimation of the net unit costs of a service - imputing unit subsidies to individuals which are identified as user of the service (based on household surveys) - aggregation of individuals into sub-groups (sex should be one of the criteria, others might be urban/rural, income quintiles etc.)
Techniques	Quantitative data analysis
Actors	Ministry of Finance, Central Statistical Offices, Research Centres
Data Requirements	<p>Unit costs of providing a particular service (this might be complicated because of the operation of several tiers of government (local, provincial, national) and by discrepancies in the data reported by different sources)</p> <p>The number of units utilised by men and women, boys and girls (may be obtained from government ministries providing the service, or from households surveys)</p>
Country Example	Ivory Coast: public spending on education
Advantages	Particularly valuable for establishing base lines and setting up monitoring systems.
Weaknesses	Benefit incidence reveals the problems, but does not provide information about the causes of the problems.



Handout: Benefit incidence case study: Ivory Coast

Ivory Coast, Benefit Incidence of Education Spending by Gender, Region and Quintile, 1995

Quintile/ region	Female				Male				Total			
	Subsidy	Per capita	Row share	Column share	Subsidy	Per capita	Row share	Column share	Subsidy	Per capita	Column share	
	M CFAF	CFAF	%	%	M CFAF	CFAF	%	%	M CFAF	CFAF	%	
<i>Primary</i>												
1	5,993	4,564	30.5	14.0	13,679	8,912	69.5	22.8	19,672	6,908	19.1	
2	10,135	6,900	47.0	23.7	11,443	8,265	53.0	19.1	21,578	7,562	21.0	
3	10,391	7,162	42.3	24.3	14,162	10,267	57.7	23.6	24,553	8,676	23.9	
4	9,018	6,414	39.7	21.1	13,718	9,371	60.3	22.9	22,736	7,922	22.1	
5	7,294	5,433	51.0	17.0	7,008	4,643	49.0	11.7	14,301	5,015	13.9	
Côte d'Ivoire	42,831	6,135	41.6	100.0	60,009	8,252	58.4	100.0	102,840	7,215	100.0	
Rural	21,801	5,591	38.3	50.9	35,061	7,960	61.7	58.4	56,862	6,848	55.3	
Urban	21,029	6,824	45.7	49.1	24,948	8,701	54.3	41.6	45,977	7,728	44.7	
<i>Secondary (including technical)</i>												
1	1,044	795	30.4	4.2	3,112	2,028	90.6	6.8	3,433	1,206	5.2	
2	4,609	3,138	33.2	18.4	9,751	7,043	70.2	21.2	13,882	4,865	20.9	
3	3,656	2,520	35.8	14.6	6,923	5,019	67.7	15.1	10,224	3,613	15.4	
4	3,127	2,224	36.5	12.5	6,252	4,271	72.9	13.6	8,572	2,987	12.9	
5	12,565	9,359	41.6	50.3	19,896	13,181	65.8	43.3	30,227	10,599	45.6	
Côte d'Ivoire	25,001	3,581	37.7	100.0	45,933	6,317	69.2	100.0	66,335	4,654	100.0	
Rural	3,146	807	19.0	12.6	14,095	3,200	85.0	30.7	16,578	1,996	25.0	
Urban	21,855	7,092	43.9	87.4	31,838	11,103	64.0	69.3	49,759	8,364	75.0	
<i>Tertiary (including technical)</i>												
1	0	0	0.0	0.0	4,650	3,030	100.0	17.4	4,650	1,633	12.3	
2	0	0	0.0	0.0	856	618	100.0	3.2	856	300	2.3	
3	550	379	50.0	5.0	550	399	50.0	2.1	1,100	389	2.9	
4	877	624	20.0	7.9	3,506	2,542	80.0	13.1	4,384	1,528	11.6	
5	9,658	7,194	36.0	87.1	17,169	11,375	64.0	64.2	26,827	9,407	70.9	
Côte d'Ivoire	11,085	1,588	29.3	100.0	26,732	3,676	70.7	100.0	37,817	2,653	100.0	
Rural	0	0	0.0	0.0	8,151	1,851	100.0	30.5	8,151	982	21.6	
Urban	11,085	3,597	37.4	100.0	18,581	6,480	62.6	69.5	29,666	4,987	78.4	
<i>All education</i>												
1	7,037	5,359	24.7	8.9	21,440	13,970	75.3	16.2	28,477	10,000	13.5	
2	14,745	10,038	40.1	18.7	22,050	15,927	59.9	16.6	36,794	12,895	17.4	
3	14,596	10,062	40.3	18.5	21,635	15,685	59.7	16.3	36,231	12,802	17.1	
4	13,023	9,262	35.7	16.5	23,477	16,957	64.3	17.7	36,499	12,718	17.2	
5	29,517	21,985	40.1	37.4	44,072	29,199	59.9	33.2	73,589	25,803	34.8	
Côte d'Ivoire	78,917	11,304	37.3	100.0	132,674	18,245	62.7	100.0	211,591	14,845	100.0	
Rural	24,947	6,398	30.3	31.6	57,307	13,011	69.7	43.2	82,254	9,906	38.9	
Urban	53,970	17,513	41.7	68.4	75,367	26,284	58.3	56.8	129,337	21,740	61.1	

Source: Demery, Lionel: Benefit incidence: a practitioner's guide, Poverty and Social Development Group, Africa Region, The World Bank, July 2000.



Exercise: Sex-disaggregated benefit incidence analysis

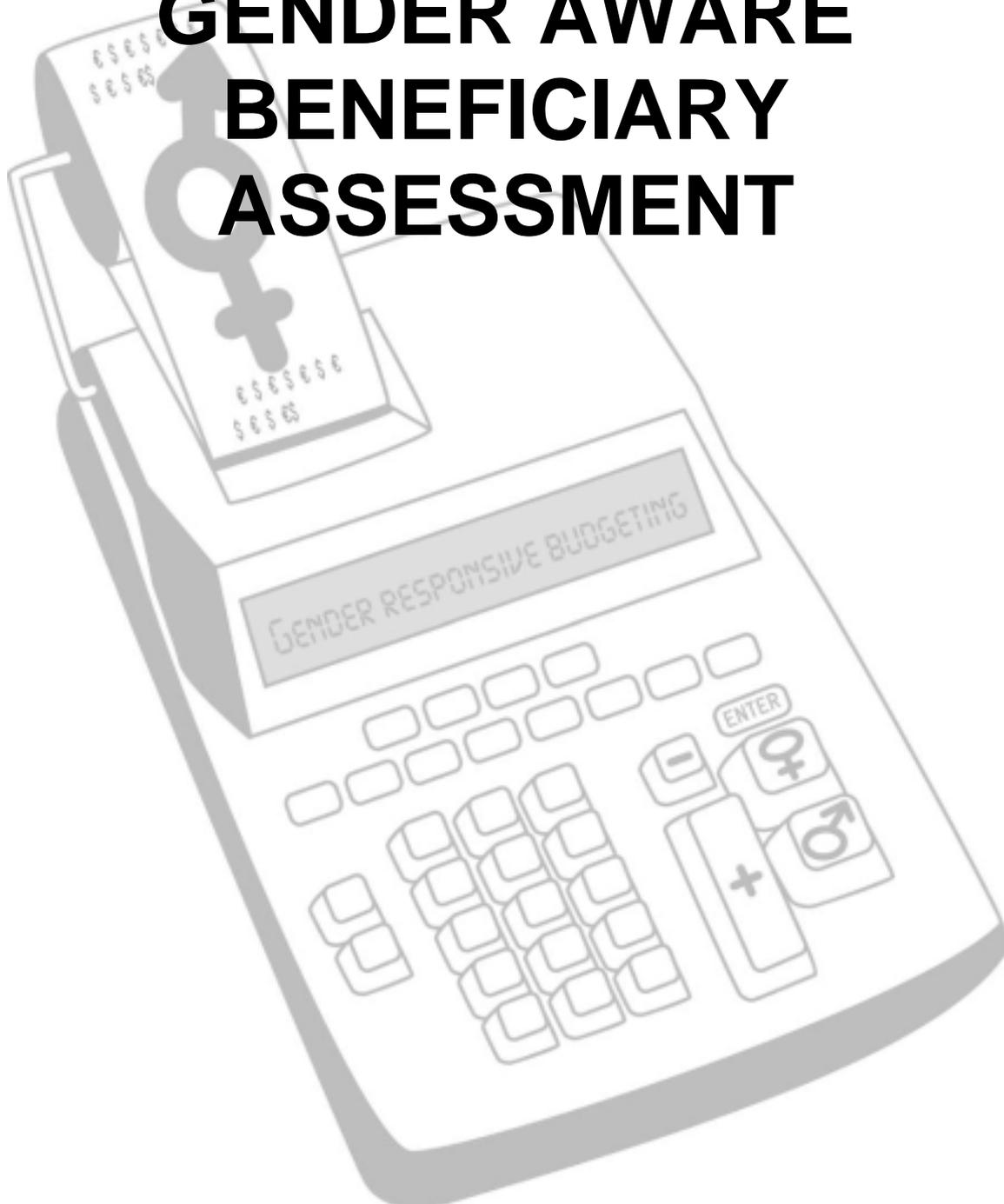
Please discuss in your working group in which sectors of the budget and with respect to what kinds of expenditures (transfers, subsidies, expenditures for public services) a sex-disaggregated public expenditure benefit incidence analysis could be applied.

Which data would you need for an analysis in the respective sector? Which budgets (national, provincial, local) would you have to look into for analysis in the respective sector?

Sector/kind of expenditure	Data	Level (national, provincial, local)

MODULE 9

GENDER AWARE BENEFICIARY ASSESSMENT



Module 9: Gender Aware Beneficiary Assessment

Objective	To introduce the tool gender aware beneficiary assessment.
Duration	90 – 180 minutes
Methods	Lecture Brainstorming Group work
Training aids	Whiteboard
Handouts	Gender-aware beneficiary assessment of public service delivery and budget priorities
Exercise	Identification of topics for interviews
Additional material	If available, you may want to use a beneficiary assessment that has been undertaken in the country that participants are coming from.

Background information:

Policy and budget makers need to know if public money is spent in a way that meets citizens' needs and fulfills their demands in respect of quality. A beneficiary assessment is a tool that aims at gathering information on the views of the actual and potential users of publicly provided services (e.g. farmers views on extension services). Beneficiary assessments might thus help to provide information as to whether money is spent on the right activities. It asks if the services that are funded through public expenditures are in line with people's priorities and address people's needs. Because women and men often have different priorities and needs due to their social roles in society, they might have different perceptions of what is useful. It is therefore important that their voices are heard equally and that their priorities and concerns are considered on equal terms.

Beneficiary assessments can apply both quantitative and qualitative methods to collect information on the perceptions and experiences of users of public services. Qualitative methods encompass one-to-one conversational interviews around key topics or interview themes, focus group discussions or participant observations. Qualitative methods are especially suitable for revealing hidden causes of behaviour, e.g. the refusal of using provided services. In many cultural settings men do not have access to foreign women. Therefore, if face-to-face interviews are used, informants should be interviewed by someone of the same sex as themselves to make sure that women's voices are heard. In general, the skills and competences of the interviewers are very important for getting meaningful results. A beneficiary assessment is usually carried out by agencies within the government or by groups within civil society. The tool can be applied to any sector which delivers services. If it covers multiple sectors, it can provide information as to whether intra-sectoral prioritization is in line with the needs of women, men, girls and boys in the community.

Further Readings:

☞ Salmen, Lawrence F.: The Voice of the Farmer in Agricultural Extension, AKIS Discussion Paper, 1999.

http://www-wds.worldbank.org/servlet/WDS_IBank_Servlet?pcont=details&eid=000094946_0106150417522

☞ Amelga, Misgana: Identifying Gender Issues Using the Beneficiary Assessment Approach: A Guide for Practitioners, 2003.

<http://web.worldbank.org/WBSITE/EXTERNAL/TOPICS/EXTSOCIALDEVELOPMENT/EXTPCENG/0,,contentMDK:20507670~pagePK:148956~piPK:216618~theSitePK:410306,00.html>

Session guide:

1. Introduce the tool gender-aware beneficiary assessments.
2. Emphasize that women should be involved in defining the themes of the interviews, that interviewers have to be both male and female, that an equal number of both women and men should be interviewed and that data of field work should be analyzed in a gender-sensitive way.
3. Distribute the handout “Gender-aware beneficiary assessments”.
4. Ask participants to form buzz groups and to carry out the exercise “Identification of topics for interviews.”
5. End the session with the presentation of the buzz groups and a short group discussion.



Handout: Gender-aware beneficiary assessment of public service delivery and budget priorities

Aim	To collect and analyze the opinions of men and women on how far current forms of public service delivery meet their needs and how far current patterns of public expenditure accord with their priorities.
Questions	Are effects and outcomes of policies in line with the political intention? Are needs of women and men addressed equally?
Methods	Potential and actual beneficiaries of a government programme are asked about their views as to whether existing forms of public service delivery meet their needs as they perceive them. Care must be taken to conduct them in ways that permit and encourage women to express their views on equal terms and to analyse findings in a disaggregated way.
Techniques	Quantitative methods such as attitude surveys, opinion polls Qualitative methods such as group discussions, focus groups, participant observation, semi-structured and conversational interviews, preference ranking and scoring, participatory rapid appraisal
Actors	Agencies within government; groups within civil society
Data Requirements	Sex-disaggregated information on the use and orientation of public services.
Advantage	Allows the voices of citizens to be heard Not necessarily costly



Handout: Examples of interview themes related to the provision of extension services

- €/# Number of extension services workers (females and males)
- €/# Selection of extension services themes
- €/# Channels of transmission of knowledge
- €/# Quality of services
- €/# Timing of the provision of services
- €/# Other responsibilities of women
- €/# Constraints to attend extension services events
- €/# Cultural constraints
- €/# Willingness and ability to pay for services



Handout: Findings of beneficiary assessments

Mali: Beneficiary Assessment in an Education Sector Project

A BA was done in Mali as part of an education project to try to understand why parents in rural areas did not send their children to school. Attendance for girls was especially low. The BA found that the costs of transportation and feeding the child at school plus the opportunity costs of losing the children's labor at home outweighed the benefits of a poor quality education with few prospects for finding a job.

These findings led to reformulation of policy to (a) reduce costs to beneficiaries by building schools in closer proximity, (b) increase attendance by designing a girl's component, and (c) train teachers to improve the relationship between parents and the school system.

Source: World Bank

Ethiopia: Cultural Inhibitions to Prenatal Care

Participant observers for a beneficiary assessment done in Ethiopia observed that pregnant women almost never visited health centers during their time of pregnancy. In-depth discussion held with men and women in the community revealed that low visitation rates lay in the cultural belief that it was weak and improper for women to admit to any pain and discomfort. This information was new to public officials in Addis Ababa and was considered useful to help orient health education among rural communities.

Source: World Bank: Beneficiary Assessment

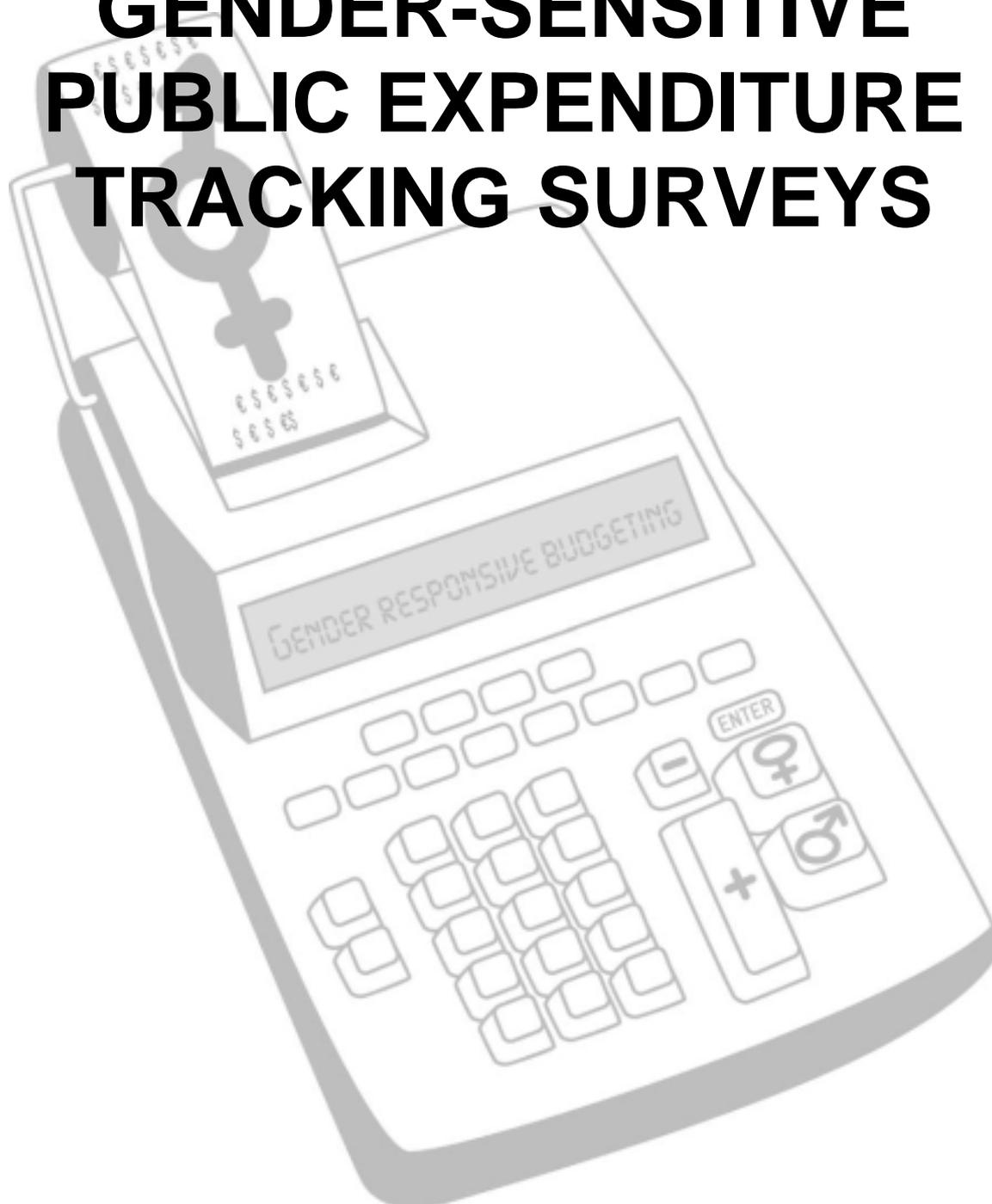


Exercise: Identification of topics for interviews

1. Please form buzz groups and identify topics related to the provision of extension services that should be covered in one-to-one qualitative interviews or focus group discussions.
2. Report your ideas back to the plenary.

MODULE 10

GENDER-SENSITIVE PUBLIC EXPENDITURE TRACKING SURVEYS



Module 10: Gender-Sensitive Public Expenditure Tracking Surveys

Objective	To introduce the tool gender-sensitive public expenditure tracking surveys.
Duration	90 minutes
Methods	Lecture Computer calculations (dependent from the target group)
Training aids	Whiteboard Computer
Handouts	Gender-sensitive public expenditure tracking surveys
Exercise	Calculation exercise
Additional material	If available, you may want to use a public expenditure tracking survey that has been undertaken in the country that participants are coming from.

Background information:

In countries with weak institutions and poor accountability budget allocations may be bad predictors of real service delivery in terms of both quantity and quality.

- ⚡ Governments may spend on the wrong goods or the wrong people.
- ⚡ Money may fail to reach the frontline service providers.
- ⚡ Even when the money reaches the primary school or health clinic, the incentives to provide the service may be weak. The result can be a high absenteeism rate among frontline service workers.
- ⚡ Even if services are effectively provided, households may not take advantage of them.

Uganda was the first country to carry out a public expenditure tracking survey (PETS) in 1996. The study was motivated by the observation that despite a substantial increase in public spending on education, the official reports showed no increase in primary school enrollment. Meanwhile, many other countries have carried out a PETS, such as Ghana, Tanzania, Kenya, Zambia, and Rwanda. Public expenditure tracking surveys seek to examine if funds that are earmarked in the budget for a special purpose reach the intended service units such as health centres and schools. By bringing together data on inputs, outputs, user charges and other characteristics they also help to assess the efficiency of public spending and the quantity and quality of public services. A PETS tracks the flow of resources through the legally defined institutional framework (different strata of administration) to determine how much of the originally allocated resources reaches each stage in the distribution process. A gender-aware public expenditure tracking survey would need to go further than this to ask who (males/females) within the service unit benefit. It could also check whether resources for items that are especially targeted to one sex reach the units, for example money for building toilets for women and girls. A PETS typically consists of a combination of data sheets and different questionnaires for interviewing facility managers and users of a given public service. Data sheets are used to collect quantitative data from facility records, and from local, regional, and national governmental institutions. A gender-aware PETS needs to make sure that both women and men are interviewed and that collected data are presented and analysed in a sex-disaggregated manner. When questionnaires are designed it must be kept in mind that respondents may have incentives to misreport. Therefore, information obtained from different sources helps with cross-validation of data. A PETS can be carried out by the Ministry of Finance, line ministries, independent research institutes, academics or NGOs. A PETS is usually done in sectors in which money (and sometimes goods) must pass through several levels of government and bureaucracy before reaching the service delivery point. Most PETS focus on education, health or agricultural extension services.

Further Readings:

- ☑ Ablo, E.; Reinikka, R.: Do Budgets Really Matter? Evidence from Public Spending on Education and Health in Uganda, 1998.
<http://www.worldbank.org/html/dec/Publications/Workpapers/WPS1900series/wps1926/wps1926.pdf>

☞ Dehn, J.; Reinikka, R., Svensson, J.: Survey Tools for Assessing Performance in Service Delivery. <http://www.eldis.org/static/DOC16651.htm>

Session guide:

1. Introduce the tool gender-sensitive public expenditure tracking surveys and discuss its strengths and weaknesses.
2. Distribute the findings of a PETS and discuss their policy implications.
3. If you can get hold of the questionnaire and the SPSS files of a public expenditure tracking survey, ask participants to calculate the tables both in a sex-disaggregated and non-disaggregated way.
4. Ask participants to present their findings and discuss the differences.



Handout: Gender-sensitive public expenditure tracking surveys

Aim	Seek to examine if funds that are earmarked in the budget for a special purpose reach the intended service units. Quantitative data including inputs, outputs, and other characteristics are collected on a sample survey basis directly from the service-providing unit (e.g. school, health station).
Question	Do allocated funds reach female and male beneficiaries equally?
Methods	Survey
Techniques	Quantitative interviews
Actors	Ministry of Finance, line ministries, independent research institutes, academics, NGOs
Country Examples	Uganda, Kenya
Data Requirements	Data need to be collected at different administrative levels
Advantage	Increase transparency
Constraint	Service providers may have a strong incentive to misreport



Exercise: Calculation exercise

1. Please have a look on the questionnaire that has been used for the PETS study you have been provided with and discuss it with participants in your working group.
2. Calculate tables linked to different questions both in a non-disaggregated and in a sex-disaggregated way. Discuss the different findings and prepare a presentation for reporting back to the plenary.

MODULE 11

SEX-DISAGGREGATED ANALYSIS OF THE IMPACT OF THE BUDGET ON TIME USE



**Module 11: Sex-disaggregated Analysis of the Impact of the Budget
on Time Use**

Objective	To introduce the tool Sex disaggregated analysis of the impact of the budget on time use.
Duration	90 – 360 minutes
Methods	Brainstorming PowerPoint presentation Calculation exercise
Training aids	Multimedia projector White Board Computer
Handouts	Sex-disaggregated analysis of the impact of the budget on time use How public spending affects women´s time use Water and the moon

Background information:

There is vast empirical evidence that macroeconomic policies including fiscal policies may negatively affect women's time burden. It has been shown for instance that cuts in expenditure for social services or the introduction of user fees often increases women's time burden. In a case study on the impact of structural adjustment on Ecuadorian women it was found that women spent more time shopping for cheaper items, bought in smaller quantities, and food preparation took longer because they bought less processed food due to social spending cut-backs. Women also had to allocate more time to income generation and community management activities at the expense of reproductive work, resulting in the shift of the reproductive work burden onto young women and girls in the family, thus reducing their available time for school work.⁸

Sex-disaggregated analysis of the impact of the budget on time use aims at analysing how government resource allocation and revenue raising patterns impact on the amount of different types of paid and unpaid work done and the way that time is spent by women and men. The work that women do in the care economy remains invisible in the System of National Accounts (SNA) and it is thus only with this sort of analysis that the impact can be seen. To analyze the impact of the budget on time use of women/girls and men/boys one needs to carry out the following steps:

1. Collecting time use data
2. Classification of the activities
3. Linking the patterns found to policies.

Time use data are normally collected by the government statistical agency. However, small-scale surveys can be carried out by NGOs, academics or research institutes. One way of linking the time use patterns to policies, at least at the macro level, is by building time use data into macro-economic models. The incorporation of the care economy into these models should eventually lead to different policy priorities. The Millennium Project Task Force on Education and Gender Equality has identified the investment in infrastructure to reduce women's and girls' time burden as being one of seven strategic priorities that need to be addressed to achieve the Millennium Goal 3 (Promote gender equality and empower women). Three types of infrastructure are considered as being particularly important: energy, transport, and water and sanitation.

⁸ Esim, 2000.

Further Readings:

☞ Budlender, D.; Chobokoane, N.; Mpetsheni, Y.: A survey of time use. How South African women and men spend their time, Statistics South Africa, Pretoria, 2001.
<http://unstats.un.org/unsd/demographic/sconcerns/tuse/profile.aspx?id=5>

☞ Statistics South Africa: Time use questionnaire 2000.
<http://unstats.un.org/unsd/demographic/sconcerns/tuse/profile.aspx?id=5>

☞ Economic Commission for Africa: A Guidebook for Mainstreaming Gender Perspectives and Household Production Into National Statistics, Budgets and Policies in Africa, 2003.

☞ UNIFEM Gender Fact Sheet No.3: Valuation of Unpaid Work.
<http://www.unifem-eseasia.org/resources/factsheets/UNIFEMSheet1.doc>

☞ United Nations Economic and Social Commission for Asia and the Pacific: Guidebook on Integrating Unpaid Work into National Policies, New York 2003
www.unescap.org/stat/meet/wipuw/unpaid_guide.asp

Session guide:

1. Ask participants how expenditure and revenue raising policies can impact on women's and men's time use differently. Provide some examples such as cutting of social sector spending, investing in roads, increasing indirect taxes.
2. Distribute the handouts with examples.
3. If time allows, distribute a copy of a time use survey, e.g. the one of South Africa. Ask participants to explain the different time use patterns of women and men and discuss resulting policy implications.
4. Introduce different methods to analyse the impact of the budget on time use.
5. Refer to the next module for one of the more sophisticated methods – the extended social accounting matrix.



Handout: Sex-disaggregated analysis of the impact of the budget on time use

Aim	To analyse the impact of government resource allocation on the amount and the way time is spent by women and men, girls and boys.
Questions	How are national budgets and time use patterns of women/girls and men/boys interlinked? Who is most affected by changes in public spending?
Methods	Time use surveys Satellite accounts Beneficiary assessments Extended social accounting matrices
Actors	Central statistical office; Ministry of Finance; line ministries, research institutes, NGOs
Data Requirements	Time use studies, income surveys
Country Examples	Ecuador (impact of social spending cut backs on time-use of women)



Handout: How public spending affects women's time use

Cuts in public spending increase women's reproductive work

In Zambia, real per capita expenditure on health fell by 16% between 1983 and 1985. In the aftermath, health stations had to close. The result was that people had to travel greater distances and wait for longer periods of time to get health care treatment. Interviews with Zambian women about their time use revealed that they had to spend more time caring for sick family members including time spent in hospitals providing meals and nursing care, and had less time to spend on farming.

Source: Evans and Young, 1988, cited in: UNIFEM: Progress of the World's Women, 2000, p. 118.

Changes in public service provision may increase women's time burden

Hospital health service programmes that measure efficiency using performance indicators such as "a reduction in the cost per patient treated" have incentives to reduce the provision of ancillary services such as laundry or food and to discharge patients earlier. As a result, mostly women dedicate more time to doing laundry for hospitalised relatives and to taking care of sick family members at home when they have been discharged. Behind much praised efficiency gains in the health sector, costs have thus been shifted onto women in private households.

Glass of Milk programme in the municipality Villa El Salvador in Peru

A gender responsive budgeting initiative in Peru carried out a case study on one of the main programmes funded through the budget of the municipality Villa El Salvador. The Glass of Milk programme is implemented to provide a daily ration of milk free of charge to beneficiaries who are mainly expecting and nursing mothers and children up to age six. Funds for this programme come from the central government transferred totally to municipalities for implementation. It is estimated that women's unpaid work to support this programme accounts for 23% of its total value.

Source: UNIFEM: Gender-sensitive budgets in Latin America: Accountability for equity and transparency, 2004, pp. 220-298. http://www.idrc.ca/gender-budgets/ev-68386-201-1-DO_TOPIC.html



Handout: Water and the moon

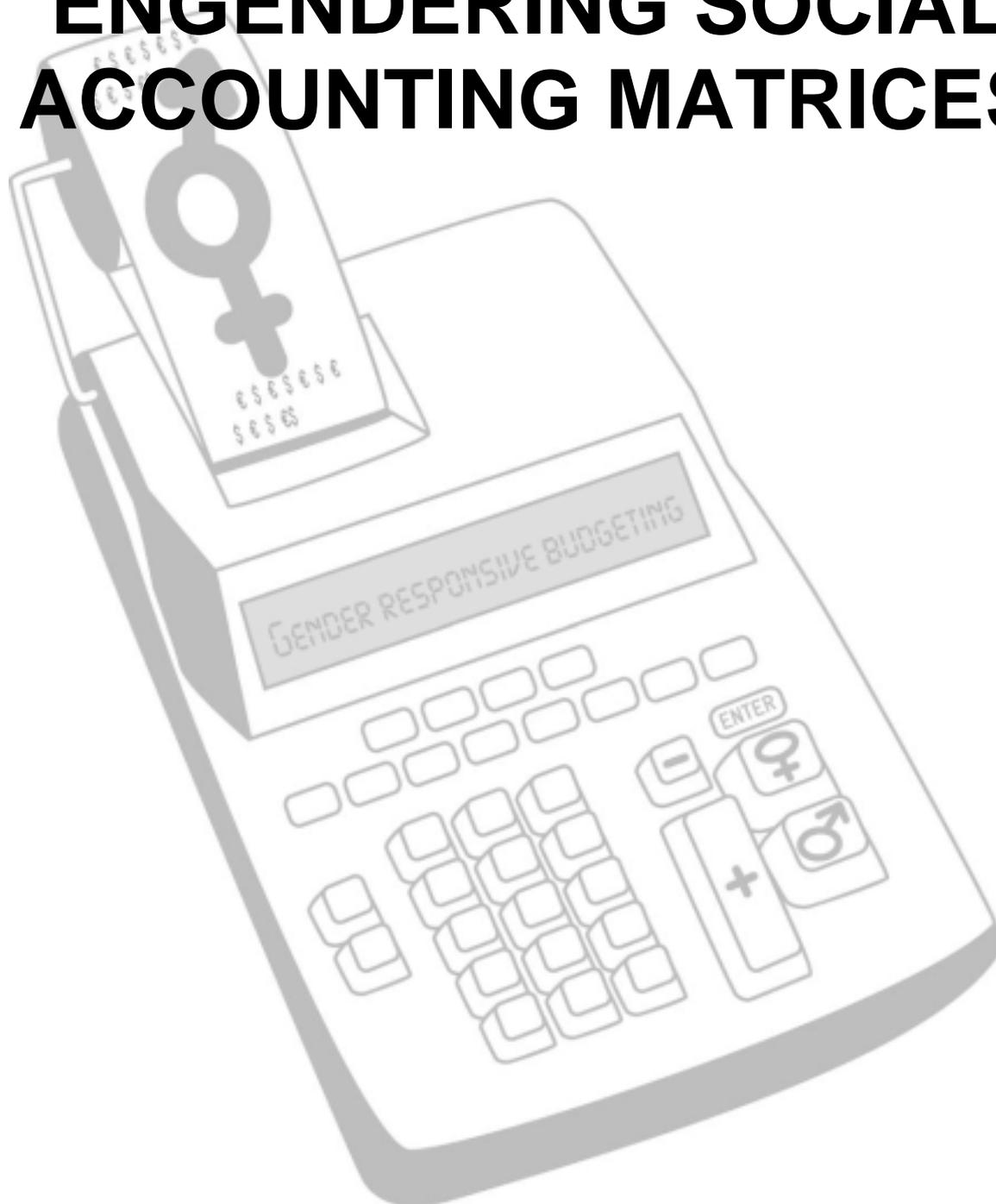
In South Africa, an estimated 16 million people have no operating water supply, with their source of water an average of 1 km away. If the average household is 5 persons, that makes 3.2 million households. If two trips to fetch water are made each day at a round-trip distance of, conservatively, 2 km each, that makes a distance of 12.8 million km walked each day, day after day, by South African women, just to fetch water. If the average distance to the moon is 384,400 km, South African women walk a distance equivalent to that to the moon and back 16 times a day just to fetch water (or 319 times around the Earth's equator). If each trip takes an average of 1 hour to walk to the place, wait in a queue, collect the water, and walk back, 6.4 million trips take 6.4 million hours a day – at 8 hours a day, 21 working days a month, 11 months a year, this represents nearly 3,500 working years each day fetching water. This is just South Africa. If you think of the rest of Africa, it is staggering – and this for only about 10 litres of water each, which is usually of suspect quality.

Source: www.thewaterpage.com, cited in: The World Bank: Integrating Gender into the World Bank's Work, Washington D.C., 2002.

<http://siteresources.worldbank.org/INTGENDER/Resources/strategy.pdf>

MODULE 12

ENGENDERING SOCIAL ACCOUNTING MATRICES



Module 12: Engendering Social Accounting Matrices

Objective	To understand the tool Social Accounting Matrices.
Duration	90 – 270 minutes
Methods	Lecture Computer calculations
Training aids	Multimedia projector Whiteboard Computer
Handouts	Structure of a standard social accounting matrix Structure of a gender-aware social accounting matrix Structure of an extended gender-aware social accounting matrix South Africa household production Input-Output table year 2000 The South African gender-aware social accounting matrix for 1998 A Macro SAM for Kenya 1997 How to read a SAM The Kenyan SAM Multiplier analysis for the Kenyan economy Household income multipliers

Background information (based on a paper written by Jane Kiringai⁹):

A Social Accounting Matrix (SAM) is a tableau which captures the economic relationships of an economy, at a point in time or accounting period, usually one year. Entries along the rows are incomes while the column entries are expenditures. The row and column totals must balance. A SAM provides a framework for integrating the macro-micro linkages of an economy in a consistent framework. Through multiplier analysis, Social Accounting Matrices have been used since the 1970s as a tool for quantitative analysis and as a basis of planning. In addition, SAMs form a benchmark data set for more dynamic Computable General Equilibrium (CGE) models. The dimensions of the matrix are determined by the level of disaggregation of the economic activities and institutions in the economy. In addition to providing a consistent framework of national accounts, a SAM also incorporates income distribution dimensions by disaggregating households by socioeconomic characteristics and also provides a consistency check for national accounts. The SAM thus represents a snapshot of the economy which forms the statistical base for the creation of a plausible model of how the economy works.

The level of analysis from SAM based models depends on the degree of disaggregation which aims at isolating target groups in the interrelationships for policy action. A SAM can thus serve three purposes:

- 1) Being a snapshot of an economy at a point in time showing production and income distribution and economic relationships between different sectors of the economy;
- 2) Serving as an internally consistent linear model;
- 3) Providing a benchmark data set for economic modelling.

More recently the usefulness of SAMs has been enhanced by the need to build “gendered” models. The disaggregation of labour and households by sex, for instance, enriches the informational content of the SAM, and provides an opportunity for engendering models. From a sex disaggregated SAM it is for instance possible to estimate the impact of increased demand of textile goods arising from the African growth and opportunity Act (AGOA) on women and men in different households and socio-economic groups.

A highly aggregated macro SAM comprises six types of accounts: activities/commodities, factors (labour and capital), institutions (households, firms and government), capital account and the rest of the world.

⁹ Kenya Institute for Public Policy Research and Analysis, Nairobi Kenya. E-mail: kiringai@kippra.org.ke

The following table represents a prototype aggregated SAM:

Receipts	Expenditure					
	Activity	Commodity	Factors	Institutions	World	Capital account
Activity		Domestic sales				
Commodities	Intermediate inputs			Final demand	Exports	Investment
Factors	Value added (wages/rentals)					
Institutions (households/enterprises/government)		Tariffs	Factor incomes		Capital inflow	
World		Imports				
Capital account				Institutions savings	Capital transfers	
Totals	Total costs	Total absorption	Total factor expenditure	Gross domestic income	Foreign exchange inflow	

A SAM multiplier analysis is concerned with the relationship between production, factor demands and income.

The key assumptions in SAM multiplier analysis are that:

- i. There exists excess capacity which would allow prices to remain constant.
- ii. Expenditure propensities for endogenous accounts remain constant.
- iii. Production technology and resource endowment are given.
- iv. Resource endowments are given for a period—bearing in mind that a SAM is a snapshot of the economy at a point in time.

Under these assumptions the SAM can be used to estimate the effect of exogenous changes (increase or decrease for specific products) in the whole economy. Exogenous accounts, which are the source of injections, include transfers to firms and institutions (from government and the rest of the world) and increased demand for production activities/commodities, government consumption and investment. The

remaining accounts, i.e. savings, indirect taxes, transfers abroad and imports, are leakages from the economy. The analysis extends beyond input-output relationships to distribution of factor incomes determined by household endowment. Due to the institutional details in the SAM, the multiplier analysis can be used to design more policy interventions. Multiplier analysis is a quantitative analysis of the impact of a unit external injection on the entire economy in a consistent framework. The magnitude of the multiplier or second round effects on household incomes depends on technology used and household endowments, and the degree of integration in the economy.

The unitary external injections would be, for instance, the construction of a tourist hotel. The construction increases the demand for low skilled labour which in turn increases the incomes of households endowed with low skill labour. Once the incomes increase, consumption of these households increases and the demand for food increases, production of food also increases and the cycle continues until the multiplier dampens.

The analysis reveals the accounts in the economy with greater capacity to generate expansion on the overall economic system. For a sex-disaggregated analysis therefore, the objective would be to determine the accounts which have the highest impact on targeted socioeconomic groups disaggregated by sex.

The recent development in SAM construction is the inclusion of the reproductive economy using data from time use surveys to form the extended SAM. In Africa, this has been done for the South African economy. It allows for an analysis of the impact of policies on time use patterns of women and men of different socio-economic groups.

Further Readings:

☑ UN Economic Commission for Africa, African Centre for Gender and Development: A Technical Report on a Gender-aware Macroeconomic Model for Evaluating Impacts of Policies on Poverty Reduction in Africa: The Case of South Africa, Part I: Building of an Extended Gender-Aware Social Accounting Matrix, 2003.

☑ UN Economic Commission for Africa, African Centre for Gender and Development: A Technical Report on a Gender-aware Macroeconomic Model for Evaluating Impacts of Policies on Poverty Reduction in Africa: The Case of South Africa, Part II: Construction of the Model and Policy Simulation Results, 2003.

Session guide:

1. Distribute the handout “Structure of a standard social accounting matrix”, explain the structure of a SAM and ask participants to brainstorm how the gender dimension could be included in the structure of a SAM.
2. Distribute the handouts “Structure of a gender-aware social accounting matrix” and “Structure of an extended gender-aware social accounting matrix”. Ask participants what kind of data would be necessary to construct these kinds of SAMs.
3. If time allows use South Africa or Kenya as a case study.
4. Explain the main principles of a multiplier analysis and ask participants to discuss why this kind of analysis could be useful for gender responsive budgeting initiatives.



Handout: Structure of a standard social accounting matrix

	Labour (C1)	Capital (C2)	Household (C3)	Firms (C4)	Government (C5)	Import Tariffs (C5.a)	Export Taxes (C5.b)	Direct taxes (C5.c)	Indirect Taxes (C5.d)	Industries (C6)	Commodities (C7)	Accumulation (C8)	ROW (C9.a)	Export (C9.b)	TOTAL
Labour (C1)										Payment to Labour					
Capital (C2)										Payment to Capital					
Households (C3)	Labour Income	Capital Income	Inter-household Transfers	Interests and Dividends to household	Government Transfers to Household								Remittances From ROW		
Firms (C4)		Capital Income	Household Transfers to firms		Government Transfers to Firms								Foreign Income to Firms		
Government (C5)		Capital Income	Household Transfers to government	Interests and Dividends payment to Government		Receipts from Tariffs	Receipts from export taxes	Receipts from Direct taxes	Receipts from Indirect taxes				Foreign Grants		
Import Tariffs (C5.a)											Import Tariffs				
Export Taxes (C5.b)														Export taxes	
Direct taxes (C5.c)			Income tax	Firms taxes											
Indirect Taxes (C5.d)										Production tax	Domestic Sales tax				
Industries (C6)			Own - Consumption								Domestic Sales			Exports	
Commodities (C7)			Household market Consumption							Intermediate Inputs		Investment expenditures			
Accumulation (C8)			Household Saving	Firms saving	Government saving								Current Account Balance		
Rest of the World (ROW) (C9.a)		Capital Income	Transfers payment to ROW	Interests and Dividends payment to ROW	Government payment to ROW						Imports				
Export (C9.b)													Exports		
TOTAL															

Source: United Nations Economic and Social Council, Economic Commission for Africa: A Technical Report on A Gender-aware Macroeconomic Model for Evaluating Impacts of Policies on Poverty Reduction in Africa: The Case for South Africa, 2003.



Handout: Structure of a gender-aware social accounting matrix

	Male Labour (C1)	Female Labour (C1)	Capital (C2)	Household (C3)	Firms (C4)	Government (C5)	Import Tariffs (C5.a)	Export Taxes (C5.b)	Direct taxes (C5.c)	Indirect Taxes (C5.d)	Industries (C6)	Commodities (C7)	Accumulation (C8)	ROW (C9.a)	Export (C9.b)	TOTAL
Male Labour (C1.a)											Payment to Male Labour					
Female Labour (C1.b)											Payment to Female Labour					
Capital (C2)											Payment to Capital					
Households (C3)	Male Labour Income	Female Labour Income	Capital Income	Inter-household Transfers	Interests and Dividends to household	Government Transfers to Household								Remittances From ROW		
Firms (C4)			Capital Income	Household Transfers to firms		Government Transfers to Firms								Foreign Income to Firms		
Government (C5)			Capital Income	Household Transfers to government	Interests and Dividends payment to Government		Receipts from Tariffs	Receipts from export taxes	Receipts from Direct taxes	Receipts from Indirect taxes				Foreign Grants		
Import Tariffs (C5.a)												Import Tariffs				
Export Taxes (C5.b)															Export taxes	
Direct taxes (C5.c)				Income tax	Firms taxes											
Indirect Taxes (C5.d)											Production tax	Domestic Sale tax				
Industries (C6)				Own - Consumption								Domestic Sale			Exports	
Commodities (C7)				Household market Consumption							Intermediate Input		Investment expenditures			
Accumulation (C8)				Household Saving	Firms saving	Government saving									Current Account Balance	
Rest of the World (ROW) (C9.a)			Capital Income	Transfers payment to ROW	Interests and Dividends payment to ROW	Government payment to ROW						Imports				
Export (C9.b)														Exports		
TOTAL																

Source: United Nations Economic and Social Council, Economic Commission for Africa: A Technical Report on A Gender-aware Macroeconomic Model for Evaluating Impacts of Policies on Poverty Reduction in Africa: The Case for South Africa, 2003.



Handout: Structure of an extended gender-aware social accounting matrix

	SNA PRODUCTION OR MARKET ACTIVITIES									NON-SNA PRODUCTION OR NON-MARKET ACTIVITIES			NON-PRODUCTIVE ACTIVITIES		TOTAL	
	SNA-Male Labour (C1a)	SNA-Female Labour (C1b)	SNA-Capital Factor (C2)	Household (C3)	Other Institutions (C4)	Taxes (C5)	Industries (C6)	Commodities (C7)	Export (C8)	Accumulation (C9)	Non-SNA Labour (C10)	Non-SNA Labour (C11)	Household Activities (C12)	Male Personal Activities (C13)		Female Personal Activities (C14)
SNA Male Labour (C1.a)							Payment to Male Labour									
SNA Female Labour (C1.b)							Payment to Female Labour									
SNA Capital (C2)							Payment to Capital									
Households (C3)	Male Labour Income	Female Labour Income	Capital Income	Inter-household Transfers	Transfers income to household						Value of male domestic work	Value of female domestic work		Value of male leisure time	Value of female leisure time	
Other Institutions (C4)			Capital Income	Transfers payment from household		Tax receipts		Imports								
Taxes (C5)				Direct tax			Production tax	Domestic Sale tax and Import Tariffs	Export taxes							
Industries (C6)				Own-Consumption				Domestic Sale	Exports							
Commodities (C7)				Household Market Consumption			Intermediate Input			Investment expenditures						
Export (C8)					Exports											
Accumulation (C9)				Household Savings	Current Account Balance											
Non-SNA Male Labour (C10)													Value of male domestic work			
Non-SNA Female Labour (C11)													Value of female domestic work			
Household Activities (C12)				Consumption of home produced commodities												
Male Personal Activity				Value of male leisure time												

(C13)				time													
Female Personal Activity (C14)				Value of female leisure time													
TOTAL																	

Source: United Nations Economic and Social Council, Economic Commission for Africa: A Technical Report on A Gender-aware Macroeconomic Model for Evaluating Impacts of Policies on Poverty Reduction in Africa: The Case for South Africa, 2003.



Handout: South Africa household production Input-Output table year 2000

South Africa Household Production Input-Output Table Year 2000

Concise Table

Preliminary Estimates 4 April 2005

	Intermediate Inputs -				Factors of Production -			Value	Gross	Hours
	Materials	Energy	Services	Total	Equipment	Housing	Labour	Added	Output	per
	R million	R million	R million	R million	R million	R million	R million	R million	R million	Year
Human Capital Activities										
School, college, etc attendance	0	0	12248	12248	1386	0		1386	13635	14330
Homework	0	224	414	637	503	2073		2576	3213	3650
Additional study, non-formal education, etc	0	0	0	0	32	0		32	32	335
Travel for learning (including waiting time)	1713	2198	1817	5728	2917	0		2917	8645	3077
Personal hygiene & health	11394	622	18401	30416	1551	5758		7309	37726	8038
Sleep	0	7352	13587	20939	4919	68080		72999	93938	119894
Doing nothing, rest & relax	12295	493	911	13699	1108	4564		5672	19371	8038
Leisure Activities										
Eating & drinking	14043	870	1608	16521	1955	8058		10013	26535	14191
Participating in cultural activities	0	0	0	0	82	0		82	82	847
Participating in religious activities	0	0	2177	2177	300	0		300	2477	3100
Socialising with family (including socialising)	0	765	1413	2178	1719	7082		8801	10980	12481
Socialising with non-family (including waiting)	0	0	8333	8333	1070	0		1070	9403	11063
Socialising with both family & non-family	0	29	54	83	66	270		336	419	476
Arts, music, hobbies	0	14	26	40	32	130		162	202	230
Indoor & outdoor sports participation	0	0	488	488	204	0		204	691	2104
Games & other pastimes	0	253	468	722	12220	2346		14567	15288	4132
Spectator to sports, exhibitions, concerts	0	0	186	186	40	0		40	225	411
Social, cultural, recreational n.e.c.	0	0	0	0	5	0		5	5	4132
Travel related to social & cultural (incl. waiting)	3191	4094	20821	28106	5432	0		5432	33538	5730
Reading	662	82	151	895	184	756		940	1835	1332

Watch TV & video	0	960	3518	4478	4917	8890		13807	18285	15657
Listening music or radio	0	344	636	980	773	3185		3958	4937	5609
Accessing information by computer	0	6	12	18	2853	60		2913	2931	105
Visiting library, mass media use & entertainment n.e.c.	0	1	1	2	5	7		11	13	43
Travel related to mass media use	32	40	33	105	54	0		54	159	57
Household Production Activities										
Food & drink preparation	75317	685	4735	80737	2064	6348	182748	191160	271897	11179
Cleaning & upkeep of dwelling	0	468	4231	4699	1052	4336	124842	130231	134931	7637
Clothes care	0	216	799	1015	485	1999	57547	60031	61046	3520
Shopping	0	0	0	0	127	0	21388	21515	21515	1308
Care of children and other household members	0	222	3776	3998	499	2056	59195	61750	65748	3621
Travel related to care (including waiting)	177	228	188	593	302	0	5209	5511	6104	319
D-I-Y home improvements	0	32	60	92	73	299	8614	8985	9078	527
Accessing government services (including waiting)	0	0	0	0	20	0	3389	3409	3409	207
Household management	0	5	2186	2191	11	46	1327	1384	3576	81
Pet care	0	7	213	220	15	61	1764	1840	2060	108
Travel for household maintenance (including waiting)	788	1011	836	2635	1342	0	23141	24483	27118	1416
Household maintenance nec (including waiting)	0	7	12	19	15	61	1762	1839	1857	108
Chopping wood not for cooking	0	76	141	218	172	708	20384	21264	21481	1247
Community services and help for other households	0	0	0	0	67	0	11345	11412	11412	694
Travel related to community services (including waiting)	98	126	104	329	167	0	2886	3054	3382	177
Market Production Activities										
Employment for establishments	0	0	0	0	1980	0	334568	336548	336548	20466
Primary production not for establishments	0	0	0	0	418	0	70571	70989	70989	4317
Services for income and other goods production	0	139	258	397	313	1291	37161	38765	39162	2273
Travel related to work in establishment (incl. waiting)	2079	2667	2204	6949	3538	0	61026	64564	71514	3733
Travel related to primary production (incl. waiting)	384	493	407	1285	654	0	11281	11935	13219	690
Travel related to non-establishment production (incl. waiting)	168	215	178	561	286	0	4925	5211	5772	301

											Per cent
Human Capital Activities	25402	10889	47378	83668	12417	80475		92891	176560	157362	51.9%
Leisure Activities	17234	7459	39926	65312	31910	30785		62695	128007	81698	27.0%
Household Production Activities	76381	3084	17282	96746	6411	15915	525541	547866	644612	32148	10.6%
Market Production Activities (At Market Work)	0	139	258	397	2711	1291	442300	446302	446699	27056	8.9%
Market Production Activities (Travel for Market Work)	2630	3375	2789	8795	4478	0	77232	81710	90505	4724	1.6%
Total All Activities	121647	24945	107632	254918	57927	128465	1045073	1231465	1486383	302988	100.0%
Gross Household Product (GHP)					57927	128465	525541	711933			
South Africa GDP at Current Market Prices R Million				Year 2000				922146			
South Africa Total compensation of employees R Million				Year 2000		442302					

Source: Estimates of the Gender and Macroeconomics Team, UN Economic Commission for Africa and Households Research Unit, Department of Economics, University of Melbourne
 Based on Statistics South Africa publications (2001) "A Survey of Time Use: How South African women and men spend their time" and (2002) "Income and expenditure of households 2000 South Africa"



Handout: The South African gender-aware social accounting matrix for 1998 (R million)

		STANDARD SOCIAL ACCOUNTING MATRIX (SAM) ACCOUNTS															EXTENDED ACCOUNTS OR SATELLITE ACCOUNTS						TOTAL													
		SYSTEM OF NATIONAL ACCOUNTS (SNA) OR MARKET PRODUCTION															NON-SNA OR NON-MARKET PRODUCTION			NON-PRODUCTIVE ACTIVITIES																
		FACTORS			INSTITUTIONS				TAXES			INDUSTRIES	COMMODITIES		EXPORT	INVESTMENT	HOME WORK	HOME ACTIVITY	LEISURE																	
		1.1	1.2	1.3	2.1	2.2	2.3	2.4	2.3a	2.3b	2.3c	3	4	5	6	7	8.1	8.2	9	10.1	10.2	11.1		11.2												
STANDARD SOCIAL ACCOUNTING MATRIX ACCOUNTS	FACTORS	1.1	Male Labour																							326614										
		1.2	Female Labour																							124811										
		1.3	Capital																							223024										
	INSTITUTIONS	2.1	Households	326614	124811	18400	63262	30812	190																114698	217194			995655	741323	660682	399124	3692765			
		2.2	Firms					207127			43786	6686																						257599		
		2.3	Government					15896	1035	10133	148	105306	58408	6642																						197568
		2.4	Rest of the World						1906	20965	5577																						200766			
	TAXES	2.3a	Taxes on income and wealth																											105306						
		2.3b	Taxes on products																											58408						
		2.3c	Import duties																											6642						
INDUSTRIES	3	Industries																													1475210					
	COMMODITIES	4	Commodities																													1536742				
5		Non-competitive import goods																													3218					
EXPORT	6	Export Commodities																																		
	7	Accumulation																													123865					
EXTENDED OR SATELLITE ACCOUNTS	HOME WORK	8.1	Male household work																													114698				
		8.2	Female household work																													217194				
	HOME ACTIVITY	9	Household Activities																													331892				

LEISURE TIME	NON-PRODUCTIVE ACTIVITIES																					
		10.1	Male Personal care																			995655
10.2	Female Personal care																				741323	
11.1	Male learning and other leisure																				660682	
11.2	Female learning and other leisure																				399124	
TOTAL		326614	124811	223024	3692766	257599	197568	200766	105306	58408	6642	1475210	1536742	3218	123865	114698	217194	331892	995655	741323	660682	399124

Source: Extended Gender-aware SAM with domestic production and personal activities, work and leisure time are decomposed between men and women; Revised by Fofana I, Cockburn J. and Decaluwe B., Universite Laval, May 2004, Using Statistics South Africa SAM for 1998, the survey of time use Report in 2000 and The South African Labour Market Report in 2002.

Source: United Nations Economic and Social Council, Economic Commission for Africa: A Technical Report on A Gender-aware Macroeconomic Model for Evaluating Impacts of Policies on Poverty Reduction in Africa: The Case for South Africa, 2003.



Handout: A Macro SAM for Kenya 1997

	Activities (1)	Commodities (2)	Factors (3)	Households (4)	Enterprises (5)	Domestic Taxes (6)	Tariffs (7)	Government (8)	ROW (9)	Capital Account (10)	Total
Activities (1)		58,998.33									58,998.33
Commodities (2)	32,008.51			22,645.40				6,054.61	8,741.73	4,928.66	74,378.91
Factors (3)	26,989.82										26,989.82
Households (4)			11,088.83		14,402.69			880.64	1,566.07		27,938.23
Enterprises (5)			15,900.99					1,144.02	-		17,045.01
Domestic Taxes (6)		3,061.28									3,061.28
Tariffs (7)		1,244.03									1,244.03
Government (8)				996.78	1,601.43	3,061.28	1,244.03		340.80	835.00	8,079.31
ROW (9)		11,075.32			681.16			-			11,756.48
Capital Account (10)				4,296.04	359.70			-	1,107.88		5,763.62
Total	58,998.33	74,378.96	26,989.82	27,938.22	17,044.98	3,061.28	1,244.03	8,079.27	11,756.48	5,763.66	

Source: Jane Kiringai, KIPPRA



Handout: How to read a SAM (by Jane Kiringai)

Reading the Table cell (1, 2) of the Macro SAM for Kenya 1997 shows that gross output (or total sales) for the Kenyan economy was Kshs 58 billion in 1997. How was the revenue used? 32 billion Kshs were used to purchase intermediate inputs and 26.9 billion Kshs were used to pay for labour and capital (factors of production).

The commodities account generated total revenue equivalent to Kshs 74 billion, Kshs 32 billion from the sale of commodities for intermediate use, Kshs 22 billion from household purchases, Kshs 2 billion from government purchases, Kshs 8.7 billion from sale of exports and Kshs 4.9 billion for purchase of capital goods. How was the revenue used? Kshs 58 billion went into production, Kshs 3 billion to pay for taxes, Kshs 1.2 billion to pay tariffs on imports and Kshs 11 billion to purchase imports.

Household income in 1997 was Kshs 28 billion (row 3 and column 11). Where did households get income from? Households got income from the sale of labour (Kshs 11 billion (cell 4, 3), households owning firms received an income of Kshs 14 billion from enterprise profits (cell 4, 5). Government transfers, e.g. pensions, were also a source of household income and counted for Kshs 0.8 billion in 1997 (cell 4, 8). The amount of Kshs 1.5 billion was transferred from the rest of the world to households (cell 4, 9). How did the households spend the income? Households purchased commodities and services (Kshs 22.6 billion, cell 2, 4), they payed income taxes (Kshs 0.9 billion, cell 8, 4) and they saved (Kshs 4.2 billion, cell 10, 4). It is therefore possible to trace all the income and expenditures for each of the SAM accounts. At the end, income and expenditure accounts must balance.



Handout: The Kenyan SAM (by Jane Kiringai)

The full Kenyan SAM used for the multiplier analysis is disaggregated as follows:

Agricultural activities are aggregated into different sectors: maize and other cereals are aggregated into one sector, roots tubers and pulses and sugarcane are aggregated into the second sector, horticulture activities (fruits, vegetables and cut flowers) form the third sector in agriculture. The fourth sector comprises the major export crops (tea and coffee) while the fifth sector consists of livestock (beef and veal), milk and dairy.

Manufacturing activities are aggregated into five broad activities: food, textile and wood, petroleum industries and other chemicals, non metallic industries and meal products including machinery and equipment. The **utilities** electricity, water and gas are aggregated into one activity. The other activities include construction, transport and communications, owned housing, other private services, public services, forestry, fishing and mining.

Households are disaggregated into two geographical categories (rural and urban) and within each region six household types are distinguished by sex of head of household and level of income: female ultra poor, female poor and female non-poor. Similarly, male households include male ultra poor, male poor and male non-poor.

Factors of production include agricultural and non-agricultural wage labour, and agricultural and non-agricultural capital. For a detailed gender analysis, labour can be disaggregated further by sex and skill level.

In summary the Kenyan SAM accounts are as follows:

Activities/ Commodities	Factors/ Value added
Roots, tubers, pulses and sugarcane	Wage labour agricultural
Maize and other cereals	Wage labour non agricultural
Fruits, vegetables and cut flowers	Agricultural capital
Tea and coffee	Non agricultural capital
Beef, veal, milk & dairy, other livestock	
Fishing, forestry & logging	Households
Mining	Rural female ultra poor
Food	Rural female poor
Textiles & wood	Rural female non poor
Petroleum & other chemicals	Rural male ultra poor
Non metallic industries	Rural male poor
Metallic industries	Rural male non poor
Utilities	Urban female ultra poor
Construction	Urban female poor
Trade	Urban female non poor
Transport & communication	Urban male ultra poor
Owned housing	Urban male poor
Other services	Urban male non poor
Public services	
Public administration	
Education	
Health	
Agricultural services	



Handout: Multiplier analysis for the Kenyan economy (by Jane Kiringai)

The table shows that on average, the highest multipliers are in the agricultural activities although fishing has a higher multiplier at 1.72. In manufacturing only food related activities have a multiplier greater than one. Owned housing is the other high multiplier activity at 1.95, the highest among all the economic activities.

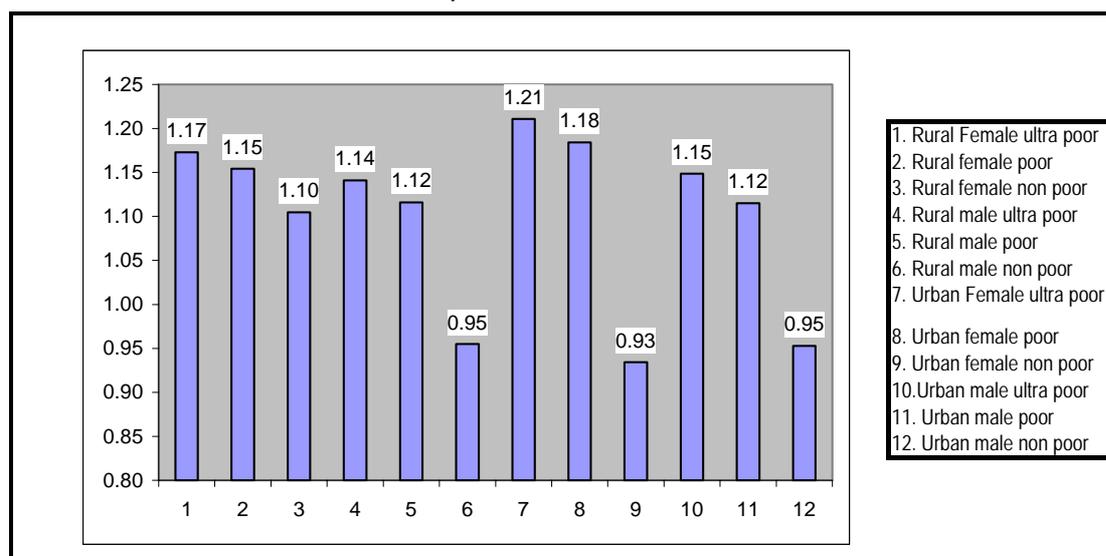
Table: Gross Output and Value Added Multipliers

Activity	gross output multiplier	GDP (VA) multiplier
Maize	5.20	1.01
Other Cereals	5.26	1.36
Roots and Tubers	6.31	1.42
Pulses	6.26	1.30
Sugar Cane	6.64	1.44
Fruits	6.25	1.44
Vegetables	6.39	1.30
Cut flowers	6.22	1.34
Tea	6.21	1.25
Coffee, Green	6.13	1.28
Beef & Veal	6.49	1.37
Milk & Dairy	6.32	1.40
Other Livestock	5.97	1.35
Fishing	6.55	1.72
Forestry & Logging	4.97	1.23
Mining	5.14	0.74
Food	6.12	1.20
Textiles, Leather & Footwear	4.16	0.53
Wood & Paper	4.19	0.66
Petroleum	5.64	0.68
Other Chemicals	2.48	0.29
Non metallic	4.65	0.71
Metal Products (incl. Mach & Equ)	1.55	0.08
Electricity, Gas & Water	7.04	0.96
Construction	6.62	1.27
Trade	7.20	1.62
Transport & Communication	5.73	1.33
Owned Housing	6.97	1.95
Other Private Services (incl. Hotels, Restaurants & Financial Services)	6.20	1.35
Public Admin	7.20	1.26
Education	7.42	1.08
Health	7.18	1.48
Agricultural Services	7.15	1.51

Within agriculture export activities/commodities have the lowest multipliers; tea has the lowest at 1.25, coffee at 1.28 and cut flowers at 1.34, compared to 1.44 for fruits and sugarcane, 1.42 for roots and tubers and 1.36 for other cereals. Investments towards increasing the productivity of non export crops are critical for the elimination of hunger which is one of the MDGs. Furthermore, an additional benefit results in generating economic activity through strong backward linkages. From a gender perspective it is important to ask how the multipliers relate to household incomes and if there are gender differentials, and how a unit injection impacts on each household type in the economy.

The chart shows the household income multipliers by type of household. The household income multiplier can be interpreted as the impact of a unit external injection to the different household groups. An example of such an injection is a bursary or even a fertilizer subsidy. Again the multipliers are greater than 1 because of the initial unit injection.

Chart: Household income multipliers



The analysis indicates that household 7, the urban female headed ultra poor household has the highest GDP multiplier of 1.21 followed by the urban female headed poor household with a multiplier of 1.18. The rural female headed ultra poor household ranks third with a multiplier of 1.17 and in the fourth place are rural female poor and urban male ultra poor households each with a multiplier of 1.15. The rich households have the lowest multipliers; the urban female headed rich household with a multiplier of 0.93, the rural and urban male households with a multiplier of 0.95. From these households, the economy does not recover the initial injection.

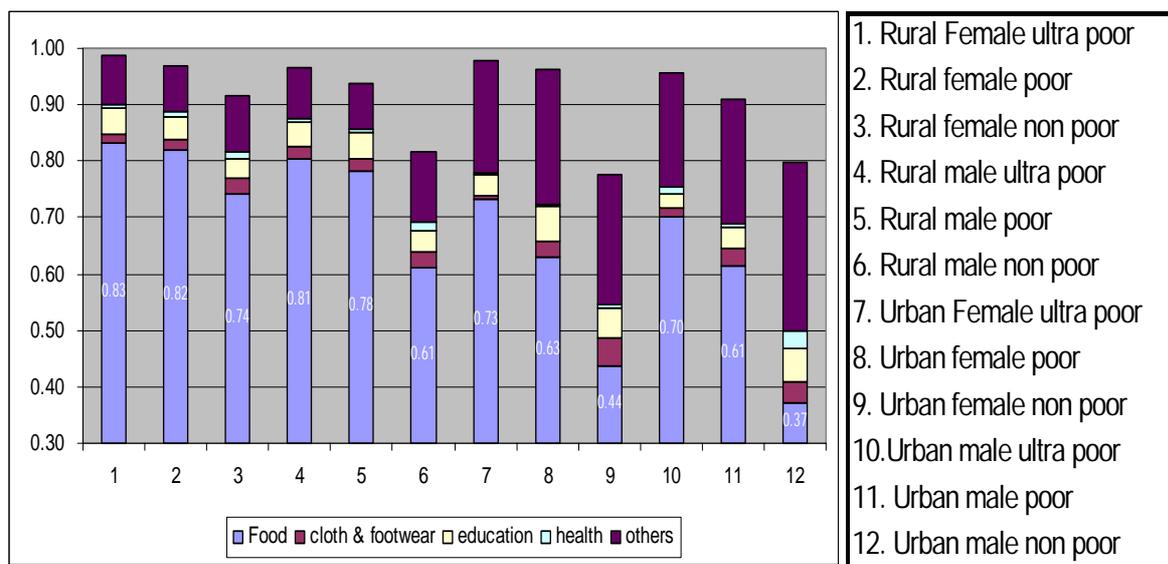
This analysis shows that for the Kenyan economy to achieve high sustained levels of economic growth the policies must be reoriented towards increasing the demand from poor households especially from female headed households. High demand from

these households has the potential to spur economic activity with a high potential for increasing value added in the economy.

A closer analysis of the average expenditure propensities by household type provides some deeper insights to why this is the case.

From the table it is evident that three types of households rural ultra poor and poor female headed households and ultra poor male headed households (households 1, 2 and 4 respectively), spend over 80% of their income on food.

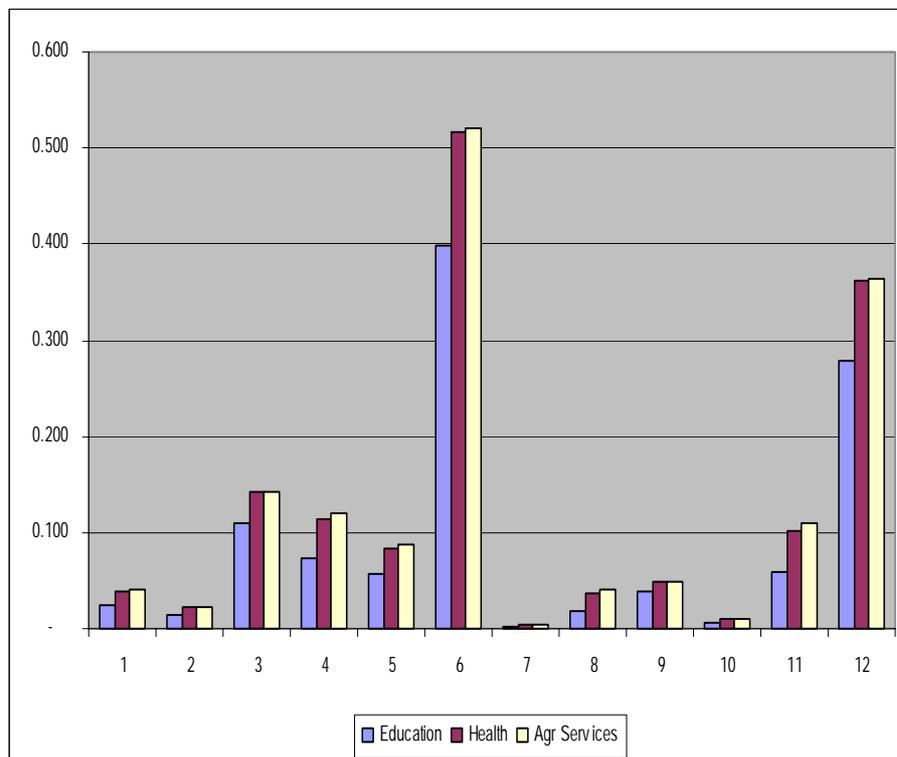
Chart: Average Expenditure Propensities



The rich urban households spend about 40% of their income on food and the rest is left for the consumption of other goods. One possibility is that the consumption of these households has a high import share of luxury goods which has no potential for value addition.

With respect to gender responsive budgeting, it is interesting to ask how household incomes benefit from public investment. In the following it is examined how the household income multiplies from public investment in health, education, agriculture and public administration. The multipliers are presented in the following chart .

Chart: Household Income Multipliers from Public Investments



1. Rural Female ultra poor
2. Rural female poor
3. Rural female non poor
4. Rural male ultra poor
5. Rural male poor
6. Rural male non poor
7. Urban Female ultra poor
8. Urban female poor
9. Urban female non poor
10. Urban male ultra poor
11. Urban male poor
12. Urban male non poor

Based on the table, three observations can be made: The first is that public spending is skewed in favour of high income male headed households. Secondly, that public investments in agricultural services have the highest multipliers closely followed by health. From the table it can be seen that urban female ultra poor household benefit least from public spending. The third observation is that out of the six household types that have minimal benefit from public spending (1, 2, 7, 8, 9, 10), five are female headed (1, 2, 7, 8, 9).

The analysis shows that interventions targeted at poor female headed households have a higher multiplier effect on the economy compared to male headed households. Further, the analysis shows that there are gender disparities in access to/utilisation of public resources. This shows that universal provision will not reduce the existing gender gaps.

The skewed nature of the multipliers might be used to build a case for more targeted interventions, rather than universal provision. Targeting is highly controversial and

difficult to implement but perhaps worth considering, especially when the fiscal space for the additional spending is not there.

The multiplier analysis shows that investments targeted towards poor female headed households have strong backward linkages with the rest of the economy and therefore a high potential for increasing the Gross Domestic Product (GDP). Further, the analysis shows that these poor female headed households have limited access to public spending in health, education and agricultural services compared to the rich male headed households.

These findings are critical for the design of interventions towards achieving the Millennium Development Goals. Unless there is a clear mechanism for targeting, universal provisioning is unlikely to reduce the gender gaps. The findings presented here are a first attempt at integrating gender in macro models. However, for a comprehensive gender analysis, labour should be disaggregated by sex and the skill level to isolate the most vulnerable groups and, based on the findings, design appropriate policy interventions.



Handout: Household income multipliers

	Hhld rural female ultra	Hhld rural female poor	Hhld rural female non	Hhld rural male ultra	Hhld rural male poor	Hhld rural male non	Hhld urban female ultra	Hhld urban female poor	Hhld urban female non	Hhld urban male ultra	Hhld urban male poor	Hhld urban male non	Total (GDP Miltpliers)
Maize	0.041	0.023	0.116	0.111	0.074	0.379	0.002	0.010	0.022	0.005	0.042	0.181	1.006
Other Cereals	0.067	0.037	0.165	0.179	0.115	0.515	0.002	0.011	0.021	0.008	0.050	0.191	1.360
Roots and Tubers	0.062	0.035	0.167	0.169	0.111	0.537	0.002	0.013	0.027	0.008	0.057	0.234	1.423
Pulses	0.055	0.031	0.151	0.149	0.098	0.489	0.002	0.013	0.027	0.007	0.053	0.223	1.296
Sugar Cane	0.065	0.036	0.170	0.176	0.115	0.544	0.002	0.013	0.026	0.008	0.056	0.227	1.440
Fruits	0.063	0.035	0.169	0.170	0.112	0.543	0.002	0.014	0.028	0.008	0.057	0.237	1.437
Vegetables	0.053	0.030	0.150	0.146	0.097	0.489	0.002	0.013	0.028	0.007	0.053	0.228	1.297
Cutflowers	0.061	0.034	0.158	0.164	0.107	0.505	0.002	0.012	0.024	0.007	0.052	0.210	1.337
Tea	0.054	0.030	0.146	0.146	0.096	0.470	0.002	0.012	0.025	0.007	0.050	0.208	1.246
Coffee, Green	0.057	0.032	0.151	0.154	0.101	0.484	0.002	0.012	0.024	0.007	0.051	0.207	1.282
Beef & Veal	0.060	0.034	0.161	0.163	0.107	0.517	0.002	0.013	0.026	0.008	0.055	0.225	1.369
Milk & Dairy	0.060	0.034	0.164	0.164	0.108	0.528	0.002	0.013	0.028	0.008	0.056	0.234	1.399
Other Livestock	0.058	0.033	0.158	0.158	0.104	0.510	0.002	0.013	0.027	0.007	0.054	0.225	1.349
Fishing	0.085	0.048	0.205	0.232	0.147	0.646	0.003	0.014	0.027	0.010	0.063	0.235	1.715
Forestry & Logging	0.061	0.034	0.147	0.166	0.105	0.462	0.002	0.010	0.019	0.007	0.045	0.167	1.225
Mining	0.017	0.010	0.075	0.051	0.038	0.273	0.001	0.014	0.026	0.004	0.042	0.192	0.743
Food	0.026	0.016	0.125	0.078	0.060	0.455	0.002	0.017	0.043	0.005	0.057	0.317	1.201
Textiles, Leather & Footwear	0.012	0.007	0.054	0.037	0.028	0.197	0.001	0.010	0.019	0.003	0.030	0.138	0.535
Wood & Paper	0.015	0.009	0.066	0.046	0.034	0.242	0.001	0.012	0.023	0.003	0.037	0.170	0.660
Petroleum	0.015	0.009	0.069	0.045	0.034	0.251	0.001	0.012	0.024	0.003	0.037	0.177	0.676
Other Chemicals	0.006	0.004	0.029	0.019	0.015	0.107	0.001	0.005	0.010	0.001	0.015	0.075	0.288
Non metallic	0.015	0.009	0.073	0.046	0.036	0.268	0.001	0.011	0.025	0.003	0.036	0.189	0.713
Metal Products (incl. Mach &	0.002	0.001	0.008	0.005	0.004	0.029	0.000	0.001	0.003	0.000	0.004	0.021	0.079
Electricity, Gas & Water	0.023	0.013	0.096	0.068	0.051	0.350	0.002	0.019	0.033	0.005	0.057	0.246	0.963
Construction	0.031	0.018	0.124	0.092	0.068	0.453	0.003	0.027	0.043	0.007	0.080	0.319	1.266
Trade	0.035	0.021	0.166	0.106	0.081	0.605	0.003	0.026	0.058	0.008	0.084	0.427	1.618
Transport & Communication	0.028	0.017	0.138	0.085	0.065	0.504	0.002	0.020	0.048	0.006	0.065	0.356	1.334
Owned Housing	0.035	0.022	0.210	0.107	0.087	0.770	0.002	0.017	0.073	0.006	0.071	0.545	1.947
Other Private Services (incl. I	0.030	0.018	0.138	0.090	0.069	0.504	0.002	0.023	0.048	0.007	0.072	0.355	1.354
Public Admin	0.031	0.018	0.124	0.092	0.069	0.452	0.003	0.027	0.043	0.007	0.079	0.317	1.262
Education	0.025	0.015	0.109	0.074	0.056	0.399	0.002	0.019	0.038	0.006	0.059	0.279	1.081
Health	0.038	0.022	0.142	0.114	0.083	0.516	0.004	0.036	0.049	0.010	0.101	0.362	1.477
Agr Services	0.040	0.023	0.143	0.120	0.087	0.521	0.004	0.040	0.050	0.010	0.109	0.365	1.512

Source: Jane Kiringai, KIPPRA

MODULE 13

LOBBYING AND ADVOCACY STRATEGIES



Module 13: Lobbying and Advocacy Strategies

Objective	To understand the need to carefully plan lobbying and advocacy strategies and to share best practices.
Duration	90 – 270 minutes
Methods	Lecture/PowerPoint Presentation Brainstorming Role play
Training aids	Whiteboard Flipchart Multimedia projector
Handouts	Budget cycle Lobbying and advocacy
Exercise	Role play

Background information:

Experiences of different gender responsive budgeting initiatives have shown that lobbying and advocacy is central to the success and sustainability of the initiative. The general objective of advocacy work is to influence decision makers. But it would also be worth to lobby and advocate for a substantive number of female decision-makers. Given the different responsibilities in providing services for the family, women and men have different priorities for public spending. E.g., a study of panchayats (local governing councils) in India found that female panchayat heads tend to emphasize drinking water provision while male heads tend to emphasize irrigation systems. The reservation of seats for women in local governments in India have had a significant impact on the investment decision and have helped to promote issues that women have found to be particularly important (such as time-saving infrastructure).

While lobbying involves direct communication with decision makers and is thus a narrower term than advocacy, advocacy work encompasses all forms of persuasive communication to influence policy decisions. Advocacy work related to gender responsive budgeting can have several different objectives. It can aim at raising awareness of decision makers and the general public that gender matters in public finance, at reprioritizing budget allocations or at changing planning and budgetary procedures. Negotiations will only be successful if one addresses the right persons at the right time with the right facts and figures. Planning and budgeting normally follow an annual standardized calendar (the budget cycle). Lobbying and advocacy activities should be planned accordingly. Advocacy messages should be formulated in the language of the target group. Advocacy that is addressed to the Ministry of Finance should be evidence-based and provide realistic alternatives. Several gender budget initiatives have prepared easy-to read material and policy briefs that have been used in their advocacy work.

Further Readings:

☑ VeneKlasen, Lisa: The Politics of Budget Work: Linking Research and Advocacy, 2002. http://www.siyanda.org/docs/lv_advocacy.doc

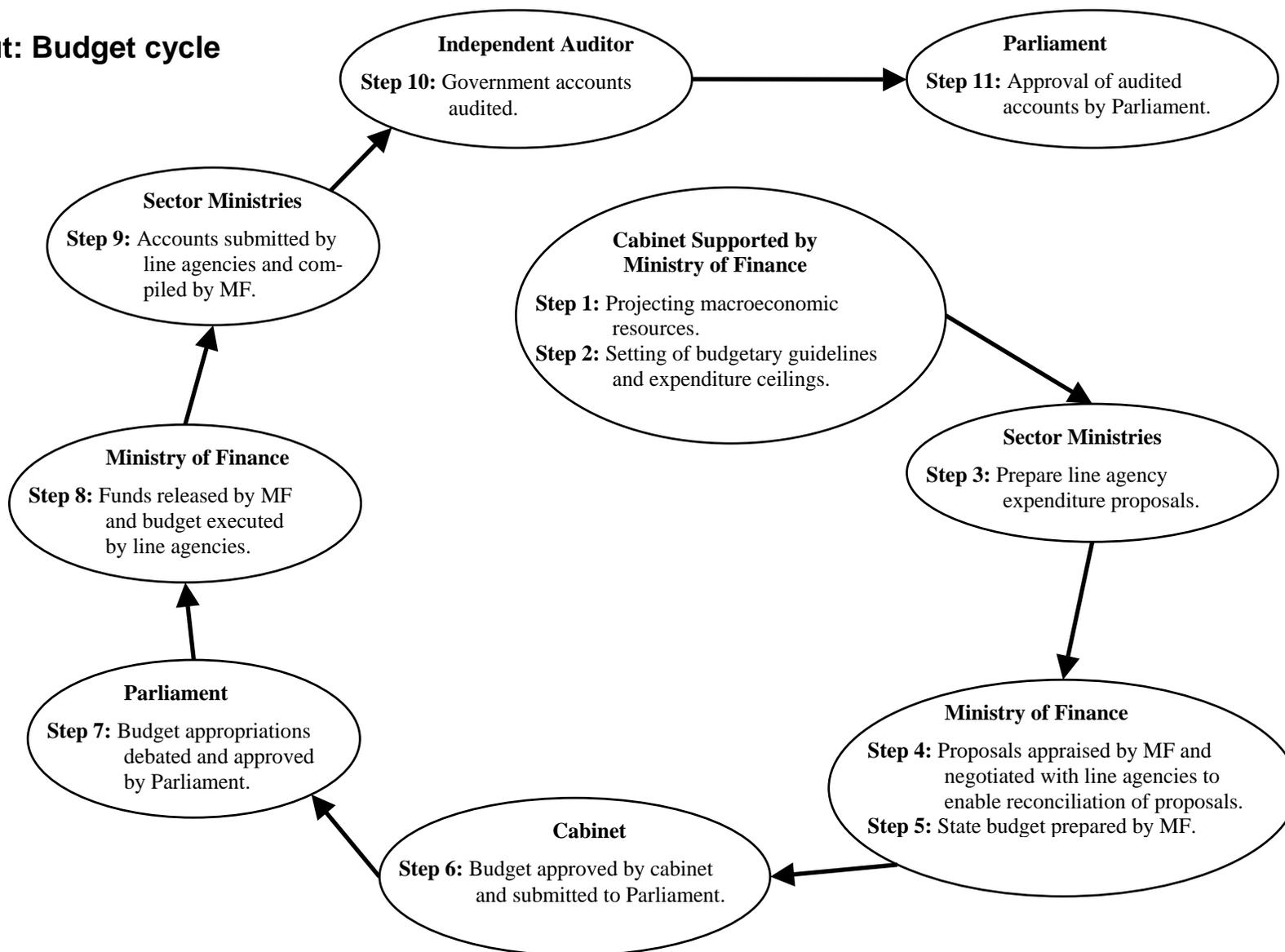
☑ Schneider, Katrin: Negotiating the Economics of PRSs: a Reference Guide for the Non-Economist, OECD/DAC Network on Gender Equality, 2006. <http://www.oecd.org/dataoecd/53/51/37021566.pdf>

Session guide:

1. Explain the difference between lobbying and advocacy.
2. Ask participants to brainstorm about the different objectives of lobbying and advocacy strategies with respect to gender responsive budgeting.
3. Ask participants to identify different actors and target groups of lobbying and advocacy activities.
4. Explain that the success of lobbying and advocacy work depends from the choice of the right timing in the budgetary process. Distribute the handout “The Budget Cycle” and discuss which time of the year is most appropriate for which activities.
5. Ask participants to carry out a role play. You may use and/or modify the role play exercise of module 6. Assign a different target group for lobbying and advocacy to each participant and ask them to prepare a short advocacy statement.
6. If time allows distribute a research report with findings relevant for gender responsive budgeting and ask participants to prepare policy briefs for different target groups.



Handout: Budget cycle



Source: PRSP Sourcebook, Chapter 6, p. 192.



Handout: Lobbying and advocacy

Some important steps to increase the influence of women on spending priorities include:

Lobby for more women in decision making positions

Although a higher number of women in economic decision making is no guarantee of more gender equitable budget policies, there is strong evidence that women's priorities, experiences and interests will be voiced in decision making to a greater extent.

Good Practice: The reservation of seats for women in local governments in India seemed to have had a significant impact on investment decisions and has helped to promote issues that women have found to be particularly important, such as time-saving infrastructure.

Target the right person

The success of lobbying and advocacy work will largely depend on how far decision makers in ministries of finance and sector/line ministries can be convinced that policy goals such as reducing poverty and stimulating growth will be better achieved if gender relations are taken into consideration. Arguments and recommendations should be presented in a short and precise manner. Briefing papers that summarise facts, figures, the main arguments or sector specific information for ministers, members of parliament and other important decision makers are of value.

Understand the budgeting process

It is essential that negotiations address the right persons at the right time with the right arguments. Planning and budgeting normally follow an annual standardised calendar, so lobbying and advocacy activities should be planned accordingly. Close co-operation between gender or women's ministries and civil society organisations is useful as the former is informed about the timetable of the political process, the internal rules and the people who have the power to change policies and spending priorities, while the latter often have good advocacy capabilities and more scope for mounting a strong argument. Mainstreaming of gender equality dimensions into planning and budgeting will be more sustainable if the gender perspective is integrated into administrative processes and routines, such as rules, guidelines, checklists and forms.

Good Practice: The Tanzanian Gender Networking Programme succeeded in convincing the Ministry of Planning to change their budgetary guidelines for the development of the 2001 year budget in six pilot sectors so that different needs and priorities of women and men were taken into consideration.

Link up research and advocacy

It may be useful for women's advocacy groups to link up with economic research institutes that can provide the necessary expertise in the critical assessment of budgets from a gender perspective and in the formulation of realistic alternatives.

Good Practice: A successful example is the co-operation between the African women's network FEMNET and the economic research institute KIPPRA in Kenya. FEMNET asked two economic researchers of KIPPRA to analyse the macroeconomic framework of the Kenyan PRSP from a gender perspective and used these findings to promote a public dialogue on gender and macroeconomics to create awareness on the need to mainstream gender equality at the macroeconomic level.

Establish strategic alliances

The higher the number of persons or organisations who pressure for a transformation of the budget content, the better the chances are of having an impact. Strategic alliances should also be established with like-minded persons in the relevant institutions. Being explicit about the differential needs of women and men makes it easier to incorporate gender equality priorities into budgets.

Good Practice: A successful strategy used by the Tanzanian Gender Networking Programme was to build a coalition with like-minded stakeholders. Gender budgeting activities were carried out by teams of researchers that included gender activists, academics, as well as government staff responsible for planning and budgeting who gave access to data that otherwise would have been hard to obtain. Over the years, a strong and confidential relationship was established with the government that permitted informal consultations and access to relevant information.

Be specific, focused, realistic and strategic

The chance of changing budget policies increases if recommendations focus on specific priorities and present realistic alternatives.

Good Practice: The Collaborative Centre for Gender and Development in Kenya successfully lobbied for increases in budget allocations such as on reproductive health or rural water conservation by changing their approach. Previously the Centre had made general policy statements. Once they started to present concrete recommendations with respect to budget allocations, they became more influential. Their recommendations were based on a policy paper on "Gender and poverty reduction in Kenya" which was supported by a coalition of around 30 different women's organisations.



Exercise: Role play

You are a member of a women's organisation and want to convince the **gender expert in the Gender Equity Mobilisation Support Unit in the Ministry of Agriculture** that budget allocations for female agricultural extension workers need to be increased in the next budget period.

- ⌘ Please draft a short statement based on the background information provided.
- ⌘ Prepare a strategy that you will pursue in a role play with the gender expert to convince her/him of your propositions with respect to a more gender-equitable re-allocation.
- ⌘ Think of the role, responsibility, power and constraints of the gender expert.

ADDITIONAL MATERIAL



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Useful websites:

<http://www.bellanet.org/grbi/docs>

<http://www.gender-budgets.org>

<http://www.gender.de/budgets>
<http://www.glow-boell.de>
<http://www.gtz.de/en/themen/politische-reformen/oeffentliche-finanzen/1824.htm>
http://www.gtz.de/gender_project/
<http://www.gtz.de/gender-equality>
<http://www2.gtz.de/gender-budgets/english>
<http://www2.gtz.de/gender-prsp/english/>
<http://www.internationalbudget.org>
<http://www.thecommonwealth.org/gender>
<http://www.thecommonwealth.org/gender/index1.htm>
http://www.undp.org/poverty/resources/gender_budgets.htm
<http://www.unifem.undp.org/progressww>
http://www.unifem.undp.org/gender_budgets/
<http://www.worldbank.org/participation/tn23.htm>
<http://www.gtz.de/prsp-gender>
<http://www.undp.org/gender/CD-Gender-and-Budgets-2004/>

Country specific websites

Kenya:

<http://www.femnet.or.ke/>

<http://www.kippra.org/>

South Africa:

<http://www.idasa.org.za>

Tanzania:

<http://www.tgnp.org>

Uganda:

<http://www.fowode.org>

II. Examples: Programmes for trainings of different lengths

**Programme for the
Advanced Training of the Trainers Course
on Gender-Responsive Budgeting that was held at Fair View Hotel, Nairobi,
July 26th – August 7th, 2004**

26.7.2004	Monday
09.00-10.30	Opening session Welcome address by Reimund Hoffmann, Acting Country Director of GTZ in Kenya
10.30-11.00	Coffee break
11.00-12.30	Introduction to the training course
12.30-13.30	Lunch break
13.30-15.00	Presentation of participants
15.00-15.30	Coffee break
15.30-17.00	Prioritisation exercise
27.7.2004	Tuesday
09.00-10.30	Introduction of main gender concepts
10.30-11.00	Coffee break
11.00-12.30	Definition and objectives of gender responsive budgeting
12.30-13.30	Lunch break
13.30-15.00	Overview of GRB activities in East Africa
15.00-15.30	Coffee break
15.30-17.00	Overview of GRB activities in East Africa
28.7.2004	Wednesday
09.00-10.30	The budgetary process and the different actors involved
10.30-11.00	Coffee break
11.00-12.30	The budgetary process and the different actors involved
12.30-13.30	Lunch break
13.30-15.00	Training needs of different actors involved
15.00-15.30	Coffee break
15.30-17.00	GRB in the context of feminist economics
29.7.2004	Thursday
09.00-10.30	Sex-disaggregated statistics and indicators
10.30-11.00	Coffee break

11.00-12.30	Gender-aware policy appraisal and its link to the budget: Case study agricultural sector in Kenya
12.30-13.30	Lunch Break
13.30-15.00	Case study agricultural sector in Kenya
15.00-15.30	Coffee break
15.30-17.00	Role play
30.7.2004	Friday
09.00-10.30	Unpaid work and time use
10.30-11.00	Coffee break
11.00-12.30	Tools for collection of time use data
12.30-13.30	Lunch break
13.30-15.00	Case study: Time use survey South Africa
15.00-15.30	Coffee break
15.30-17.00	Exercise: Classification of time use and calculation of amount of unpaid work
31.7.2004	Saturday
09.00-10.30	Presentation and discussion of results
10.30-11.00	Coffee break
11.00-12.30	Gender-aware policy appraisal (PRSP)
12.30-13.30	Lunch break
13.30-15.00	Gender-aware policy appraisal (PRSP)
1.8.2004	Sunday
	Trip to the Masai area
2.8.2004	Monday
09.00-10.30	Link between policies and budgets
10.30-11.00	Coffee break
11.00-12.30	Link between policies and budgets
12.30-13.30	Lunch break
13.30-15.00	District level budgets/workplans
15.00-15.30	Coffee break
15.30-17.00	Engendering performance budgeting
3.08.2004	Tuesday
09.00-10.30	Gender-aware medium-term economic policy frameworks
10.30-11.00	Coffee break
11.00-12.30	Exercise: Engendering MTEF guidelines
12.30-13.30	Lunch break
13.30-15.00	Exercise: Engendering MTEF guidelines
15.00-15.30	Coffee break

15.30-17.00	Engendering macroeconomic models Presentation by Jane Kiringai
04.8.2004	Wednesday
09.00-10.30	Engendering social accounting matrices Presentation by Jane Kiringai
10.30-11.00	Coffee break
11.00-12.30	Sex-disaggregated public expenditure benefit incidence analysis
12.30-13.30	Lunch break
13.30-15.00	Sex-disaggregated public expenditure benefit incidence analysis
15.00-15.30	Coffee break
15.30-17.00	Sex-disaggregated beneficiary assessments of public service delivery and budget priorities
5.8.2004	Thursday
09.00-10.30	Gender-sensitive public expenditure tracking survey
10.30-11.00	Coffee break
11.00-12.30	Gender-sensitive public expenditure tracking survey
12.30-13.30	Lunch break
13.30-15.00	How to feed results of GRB analysis into the budget process?
15.00-15.30	Coffee break
15.30-17.00	Design of training courses
	Homework: Design of training course for different target groups
6.8.2004	Friday
09.00-10.30	Presentation by participants
10.30-11.00	Coffee break
11.00-12.30	Presentation by participants
12.30-13.30	Lunch break
13.30-15.00	Presentation by participants
15.00-15.30	Coffee break
15.30-17.00	Evaluation of the training
19.00	Farewell diner
7.8.2004	Saturday
09.00-10.30	Lobbying and advocacy
10.30-11.00	Coffee break
11.00-12.30	Development of TOT Manual
12.30-13.30	Lunch

Programme for a three-days Training on Gender-Responsive Budgeting

First day	
09.00-09.30	Introduction to the training
09.30-10.30	Prioritization exercise
10.30-10.45	Coffee and tea break
10.45-12.30	Definition, basic concepts and objectives, tools and stakeholders of gender-responsive budgeting – An overview
12.30-13.30	Lunch Break
13.30-15.00	Overview of GRB activities in different countries, best practices and lessons learnt
15.00-15.15	Coffee and tea break
15.15-15.45	Sex-disaggregated statistics and indicators
15.45-16.30	Exercise: allocation of time
Second day	
09.00-09.30	Collection of time use data
09.30-10.00	Valuation of unpaid work
10.00-10.30	Case studies: Indian and South African time use survey
10.30-10.45	Coffee and tea break
10.45-12.30	Satellite accounts and extended social accounting matrixes
12.30-13.30	Lunch break
13.30-15.00	Case study: Education sector in a specific country: Gender aware policy analysis and its link to the budget
15.00-15.15	Coffee and tea break
15.15-15.45	Gender-disaggregated public expenditure benefit incidence analysis (case study from a specific country)
15.45-16.30	Gender-disaggregated beneficiary assessments of public service delivery and budget priorities
Third day	
09.00-09.30	Gender-disaggregated public expenditure tracking survey (PETS)
09.30-10.00	Gender-disaggregated revenue incidence analysis
10.00-10.30	Gender-aware medium-term economic policy frameworks and “engendered” macroeconomic models
10.30-10.45	Coffee and tea break
10.45-12.30	Gender and performance budgeting
12.30-13.30	Lunch break

13.30-14.00	Gender needs assessment to achieve Millennium Development Goal 3
14.00-15.00	Steps to implement gender responsive budgeting
15.00-15.15	Coffee and tea break
15.15-16.30	Gender responsive budgeting in a specific country

Programme for a one-day workshop on Gender-Responsive Budgeting

09.00-09.15	Introduction to the workshop
09.15-10.30	Definition, basic concepts and objectives, tools and stakeholders of gender-responsive budgeting – An overview
10.30-10.45	Coffee and tea break
10.45-11.15	Sex-disaggregated data and time use data
11.15-12.15	Gender-aware policy appraisal and its link to the budget
12.15-12.35	Gender-disaggregated public expenditure benefit incidence analysis
12.35-13.00	Sex-disaggregated beneficiary assessments of public service delivery and budget priorities
13.00-13.45	Working lunch: Overview of GRB activities in different countries, best practices and lessons learnt
13.45-14.05	Gender-sensitive public expenditure tracking surveys
14.05-14.30	Gender-aware medium-term economic policy frameworks and “engendered” macroeconomic models
14.30-15.00	Gender and performance budgeting
15.00-15.10	Coffee and tea break
15.10-15.30	Gender needs assessment to achieve Millennium Development Goals 3
15.30-16.00	Discussion of entry points for GRB in the specific country

III. Example of a training needs assessment

Training of Trainers on Gender Responsive Budgeting

Application Form

Family Name _____

Name _____

Age _____

Sex _____

Educational Background _____

Title/Responsibility _____

Organisation _____

Why are you interested in attending a training on gender responsive budgeting?

What do you expect to learn during the training?

Have you attended a gender training before?

() yes () no

If yes, which topics were covered in the training?

Have you attended a gender responsive budgeting training before?

yes no

If yes, which topics were covered in the training?

Do you have experience with designing and delivering trainings?

yes no

If yes, how many years of experience in training do you have?

What are the main areas of your trainings?

Do you have experience in delivering gender trainings?

yes no

Do you have skills in data compilation and computer – based analysis?

yes no

Are you familiar with the following topics?:

Not at all	To some extent	Very well	Topic
			Basic gender concepts (sex/gender, gender roles, practical needs and strategic interests etc.)
			The budget process in my country
			The budget documents of my country
			Definition, basic concepts and objectives of gender-responsive budgeting
			Overview of GRB activities in different countries, best practices and lessons learnt
			Collection of sex-disaggregated data
			Collection of time use data and valuation of unpaid work
			Gender-disaggregated analysis of the impact of the budget on time use (satellite accounts, extended social accounting matrixes)
			Gender-aware policy appraisal and its link to the budget
			Gender-disaggregated public expenditure benefit incidence analysis
			Gender-disaggregated beneficiary assessments of public service delivery and budget priorities
			Gender-disaggregated public expenditure tracking surveys (PETS)
			Gender-disaggregated revenue incidence analysis
			Gender-aware medium-term economic policy frameworks and „engendered“ macroeconomic models
			Gender and performance budgeting
			Gender Needs Assessment to achieve Millennium Development Goal 3
			Design of training courses on Gender Responsive Budgeting

Further remarks:

IV. Example of an evaluation sheet

Evaluation Sheet

How do you assess the Advanced Training of the Trainers Course on Gender Responsive Budgeting in general?

1 = very good, 2 = good, 3 = poor, 4 = very poor

1 2 3 4

Has the course met your expectations?

1 = very much, 2 = much, 3 = somehow, 4 = not at all

1 2 3 4

Comments:

To which extent do we have achieved the objectives of the course?

1) Enhancing participants' skills to apply selected tools of gender responsive budgeting

1 = very much, 2 = much, 3 = somehow, 4 = not at all

1 2 3 4

2) Understanding the links between gender responsive budgeting, sustainable poverty reduction, and economic growth

1 2 3 4

3) Enhancing participants' training skills in the field of gender responsive budgeting

1 2 3 4

4) Exchanging experiences and best practices from Cameroon, Kenya and Uganda

1 2 3 4

Which target groups would you feel comfortable to train on gender responsive budgeting?

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Other remarks and suggestions:

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Thank you!!

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