

What can we expect from gender sensitive budgets? Strategies in Brazil and in Chile in a comparative perspective.

By Florence Raes

Over the last decade, the international community has increasingly invested in support for governments' and civil societies' gender budgeting work worldwide. In the face of rhetorical and policy commitments not followed up by adequate public funding, gender sensitive budget initiatives seem to offer powerful tools to enhance government accountability to women's rights and gender equality. Some will argue that gender sensitive budgets may well be another short-term fad that will not deliver equality and that may detract attention and scarce resources from ongoing efforts and strategies. Practically, such criticism should not be underestimated and lessons learned from gender mainstreaming should alert us about possible risks. But, what if budgets could help us revisit the shortcomings of mainstreaming by providing more concrete and measurable instruments? This article intends to contribute to this debate through some practical examples and a comparative analysis of gender sensitive budget experiences in Brazil and in Chile.

In Latin America, gender sensitive budget exercises emerge in a context of increased legitimacy of the agenda of women's rights and of renewed interest for public budgets brought about by the discourse on "good governance". On the one hand, many governments have signed CEDAW and its facultative protocol; they have adjusted legislations and taken policy measures that favor gender equality. On the other hand, recurrent economic crisis and structural adjustment policies have struck harder on women, especially amongst the poor, notably because of the cutbacks in social spending and in the delivery of public services. In the light of these ambivalences, what are the benefits of gender sensitive budget initiatives?

The Chilean experience

In Chile, gender sensitive budget work was initiated in the late 1990's in the context of the modernization of the State. The national "Plan for improvement of public management" (Plan de Mejoramiento de Gestión, PMG) largely relies on performance-oriented reforms of public administration and of the federal budget. Within the PMG, each public institution will have to consider gender equity, amongst others, as a priority of its administration. This process is headed by the Ministry of Finance and its Budget Directorate, in close cooperation with the Women's Machinery (Servicio Nacional de la Mujer, SERNAM) and with support from international development agencies (UNIFEM, UNDP, GTZ). The overall goal is to institutionalize gender equality measures at every level and in every sector of public administration. In order to support this process, SERNAM has undertaken a series of sensitization, capacity building and training activities for civil servants on gender, public administration and budgets. Training materials and manuals were published and distributed to public servants to overcome the lack of conceptual and practical knowledge on gender equality.

The major strength of this initiative is that it relies on high-level political commitment from key Ministries and on government directives and incentives to mainstream gender equality in the reform process. Exhaustive monitoring of each administration's work plan through a gender lens is the responsibility of the Women's Machinery and positive reporting on the inclusion of gender equality criteria into work plans and activities leads to financial bonuses for the department and its employees. As a result, this strategy mobilized a wide array of civil servants in central and regional departments and administrations. The initiative also contributes to intra-governmental cooperation in the field of gender equality and gives the clear message to all Ministries and government agencies that gender equality is everybody's

business. The benefit from a multi-sector approach is that it highlights gender inequalities in sectors that are traditionally considered neutral from a gender perspective. It breaks away from a homogeneous and erroneous understanding of women's interests by showing that all women are not discriminated by all policies but that some policies are more detrimental to women under certain circumstances.

The fact that SERNAM is a major player in the reform process ensures stronger linkages with the women's agenda and strengthens the Ministry's legitimacy across government. The major paradox though is that SERNAM has received little additional resources to fulfill these new tasks, which puts pressure on the Ministry's resources and requires external budget support. On the one hand, because of the central role of Women's Machineries, gender sensitive budget initiatives should encompass institutional strengthening of such institutions. On the other hand, because it is everybody's business, gender budgeting should rely on increased investments and cross-governmental budget allocations.

At the institutional and policy levels, the Chilean experience has developed into a showcase for good practice in gender budgeting, providing insights on tools and strategies that can support mainstreaming efforts. Across Latin America, government representatives have expressed their interest in learning from the work developed by the government of Chile and have adjusted methodologies to their own national realities.

The Brazilian experience

In Brazil, the work around gender sensitive budgeting draws on a plurality of actors and strategies. This is partly due to the country's political context. At the launching of the initiative in 2001, the National Council for Women's Rights did not have the Ministerial status of today's Secretariat for Policies for Women, nor did the government engage in budget reforms where gender equality would be acknowledged as a crosscutting priority. Against this background, the gender budget initiative in Brazil, largely supported by UNIFEM and DFID, recognises the importance of working both with government and with civil society in building and consolidating accountability. It draws on the work of women's organizations such as the feminist centre for research and advocacy, CFEMEA (Centro feminista de estudos e advocacia), and sets out a multi-stakeholder approach.

Since the 1990's, women's organizations at national and community levels increasingly linked their policy advocacy and analysis work to incumbent resource allocation. Why were the programs they had fought for not resourced properly, sometimes not at all, and why when funded were these resources not spent? And, when resources were spent, why did they not generate the expected social impacts? To better understand and remedy to these shortcomings, a series of alliances were forged between women's organizations advocating the government in Brasilia and women's groups at the community level which could provide first hand feedback on the quantity and quality of service delivery. This strategy also aimed at empowering local women's organisations to exert social control. Unlike in Chile where explicit political leadership supported a multi-sector approach, in Brazil, policy choices had to be made and women's organizations decided to focus primarily on a series of programs in the health sector and on programs to combat violence against women. Expenditure tracking of selected programs highlighted low implementation and disbursement rates and mitigated social impacts. The publication of these findings was followed up by negotiations between women's organizations and government authorities on budget allocations, program implementation and monitoring mechanisms. Two Ministries responded promptly and positively. To limit discrepancies and controversies between government and civil society's findings in expenditure tracking of selected programs, the Ministry of Health (through its department for women's health) suggested to develop a joint methodology for analysis and to refine existing monitoring tools. In the process, it committed itself to make additional budget information available to the public. Like the Ministry of Health, the Women's Machinery has since posted part of its

budget execution on its website. Advocacy work has also led to the adoption of several amendments proposed by women's organizations to the Annual Budget Laws. The most notable example is maybe the re-inclusion of the Program for Women's Health, which had disappeared from public planning in 2003, in government priorities and budget allocations.

In parallel, policy dialogue with key actors of the budget process was encouraged. A public hearing on gender sensitive budgeting took place in the national Congress in 2004, gathering members of the budget commission, parliamentarians, government representatives, researchers and civil society activists. Constant involvement and institutional strengthening of the Women's Machinery and of the Women's Caucus in Congress constituted important assets to ensure the sensitization of government actors. Specific efforts were also invested in sensitizing and training managers and civil servants from the Ministry of Planning, a major player in the allocation of public resources, and from the National Court of Accounts. The Ministry of Planning has since strengthened its cooperation with the Women's Machinery to engender policy planning and budget design processes and the Court has requested technical support to include gender and race dimensions into its work on qualitative and social auditing.

In Brazil, networking is one of the major strengths of the initiative. Partnerships were established to link gender sensitive budgeting to the work on participatory budgets, transparency and to social control at local and national levels. Workshops gathered gender sensitive budget advocates and local social and political actors to reflect upon tools and strategies to engender participatory budget processes and organizations. It is important to note that, besides the experiences in participatory budgeting, overall budget allocation and monitoring processes of public expenditure in Brazil do not contemplate mechanisms for civil society participation. Against this background, various civil society organizations (NGO's, trade unions, social movements, research centres and others) gathered in 2002 to launch the Brazilian Budget Forum with the objectives to exert social control over public expenditure, to raise public awareness on budgetary processes and to increase transparency and accountability. Women's organizations participated from the start. They are part of the Forum's directorate and have gained visibility and support for their demands as the Brazilian Budget Forum takes up gender equality as a major dimension of its work. At the same time, the Brazilian Institute for Municipal Administration initiated research and dialogue with local authorities to highlight the gender blindness of traditional planning and budgeting instruments. A critical review of existing tools put emphasis on the absence of sex but also of race-disaggregated data and instruments. This has enriched the work on gender sensitive budgeting by highlighting the need to include the racial dimension into this work in Brazil.

Another important strategy which contributed to the expansion of gender budgeting work in Brazil has been to link advocacy with research and with the production of data and information. Alliances were set up with the National Institute for Socio-economic Research (INESC) and with the Institute for Applied Economic Research (IPEA) to refine methodologies and conduct joint analysis. This is particularly strategic because of the prominent role played by these institutions in socio-economic analysis and in informing decision-making in Brazil. Further work is currently underway with the Brazilian Institute for Statistics (IBGE) around the production of sex-disaggregated data. In Brazil, like in Chile, efforts also concentrated on the production and on the dissemination of knowledge and on the sharing of experiences. Seminars, workshop and conferences sensitized new social and political actors and provided increased legitimacy to the work on gender sensitive budgeting. Similarly, academic short-courses on gender and macroeconomics were organized in Chile and in Brazil (in partnership with universities and research centers) to insert the work on gender budgeting into a boarder development policy framework. Participants included economists from university departments, senior officials from key government ministries, members of research and data collection institutes and of civil society organizations working in related areas. These courses draw on the work of international and national experts on fiscal policies, taxation, monetary policies, labor markets, international trade and structural

adjustment policies. Not only did these courses provide insights to assess existing macroeconomic paradigms and policies from a gender perspective, they also opened up opportunities to bridge policy work with academic teachings and research and helped forge alliances between gender budget advocates, policy makers and economic analysts.

Some concluding remarks

Gender sensitive budget initiatives are long term processes and should be regarded as tools, not as an end. As shown in the cases of Chile and Brazil, they can deliver a variety of results: enhanced accountability of governments to women's rights, increased transparency, participation and social control over budget processes, policy effectiveness, cost-efficiency, women's empowerment and qualified participation in macroeconomic policy debates. Like in Brazil, they help build bridges between the agenda of women's rights and democratic governance. But there are no miracle recipes for successful gender sensitive budgeting experiences. Each community will identify strategies, allies and entry points according to a series of political, economic, social, cultural and institutional factors. Like in Chile, political will is a major asset. In various countries, gender advocates have taken the opportunity of the growing trend towards results-based budgeting systems to link their demands to budget processes and allocations. But, if performance budgeting and measurements can support the identification of gender gaps, we should be reminded that these systems are often introduced in a context of privatization of public services where emphasis is given to criteria of economy and efficiency over notions of effectiveness and equality and where women overwhelmingly bear the burden of so-called economies.

If institutionalization of gender equality into policy planning and budgeting should be the overall objective, gender sensitive budget exercises should not limit themselves to institutional initiatives. To avoid risks of diluting gender equality into reform processes, it is important to broaden ownership and support policy dialogue. Gender sensitive budgets are political processes. Women's participation is fundamental to ensure that the diversity of women's interests is represented and that these initiatives do not become mere technical exercises. A clear policy focus and strong links with existing actions and mechanisms for the advancement of women can limit such risks. Lessons learned from Brazil and from Chile point out that it is equally important to develop comprehensive, systematic and participatory, quantitative and qualitative, monitoring systems and to invest in the production of sex-disaggregated data and information, including gender-aware performance measures and indicators. Still, governments may well include some type of gender equality measurements into public budgets but if, in parallel, no efforts are undertaken to account for women's social and economic contributions through unpaid work, gender budgeting will fall short of fulfilling promises to improve women's life. In that respect, a major strength of gender sensitive budget work is that it provides critical inputs to rethink market-related biases imbued in the valorization of productive and reproductive work and the perverse consequences in the allocation of public resources. In a context of increased marketisation of goods and services and of results-oriented reforms of public administration, gender sensitive budget analysis highlights the monetary and non-monetary costs of gender biases at work in existing macroeconomic paradigms and policies.

Indicative Bibliography

Gender Budgets and Macroeconomics

- "Special Issue: Growth, Trade, Finance and Gender Inequality", *World Development*, vol.28, n.7, July 2000.

- Budlender D., *Budgeting to fulfill international Gender and Human rights commitments*, UNIFEM, NY, 2004.
- Budlender D., Diane Elson D., Guy Hewitt G., Tanni Mukhopadhyay T., *Gender Budgets make Cents*, Commonwealth Secretariat/IDRC/UNIFEM, 2002.
- Cagatay N., "Gender budgets and beyond: feminist fiscal policy in the context of globalization", *Gender and Development*, vol.11, n.1, May 2003.
- Cagatay N., Keklik M., Lal R., Lang J., *Budgets as if people mattered: democratizing macroeconomic policies*, UNDP Conference paper series, NY, May 2000.
- Elson D., "Integrating gender issues into national budgetary policies and procedures: some policy options", *Journal of International Development*, 10, 1998.
- Elson D., *Monitoring government budgets for compliance with CEDAW*, UNIFEM, NY, 2004.
- Hofbauer Balmori H., *Gender and Budgets*, overview report, BRIDGE, Sussex, 2003.
- Norton A. and Elson D., *What's behind the budget? Politics, Rights and Accountability in the budget process*, ODI, June 2002.
- *Parliament, the Budget and Gender*, Handbook for parliamentarians, n.6, IPU/UNIFEM/UNDP/World Bank Institute, 2004.
- Reeves H. and Wash H., *Women's and Gender Budgets: an annotated resource list*, BRIDGE Bibliography, Sussex, n.9, January 1999.
- Sharp R., *Budgeting for Equity: Gender budget initiatives within a framework of performance oriented budgeting*, UNIFEM, NY, 2003.

Gender Budgets in Latin America

- Borges Sujiyama N., *Gender Budget work in the Americas: selected country experiences*, University of Texas, 2002.
- de Villota P.(ed.), *Economía y género: macroeconomía, política fiscal y liberalización. Análisis de su impacto sobre las mujeres*, Icaria editorial/UNIFEM, Barcelona, 2004.
- de Villota P., *La política fiscal no es neutral desde la perspectiva de género. Análisis crítico de la imposición sobre la renta en la Unión Europea*, in "The impact of the tax/benefits system on women's work", European Commission, 2000.
- *Guía para la formulación de presupuestos públicos con enfoque de género en el sector salud*, Secretaria de Salud/FUNDAR, México, DF, 2004.
- Martins Costa D., *A gramática do orçamento a partir das perspectivas de gênero e raça: condições preliminares*, Congreso internacional sobre la reforma del estado y de la administración pública, Panamá, 2003.
- *Presupuesto general de la Nación: revisión desde las perspectivas de género y equidad (ejercicio fiscal 2003)*, Cámara de Senadores/UNFPA, Asunción, 2003.
- *Presupuesto municipal de Asunción: Análisis desde las perspectivas de género y equidad (ejercicio fiscal 2004)*, Municipalidad de Asunción/UNFPA, Asunción, 2004.
- *Presupuestos sensibles al género: conceptos y elementos básicos*, Secretaria de Salud/FUNDAR, México, DF, 2002.
- REPEM, *Talleres de género y presupuestos*, Serie talleres de formación en macroeconomía, UNIFEM/Heinrich Boll Stiftung, Montevideo, 2002.
- UNIFEM, *Hacia la transparencia y la gobernabilidad con equidad: presupuestos sensibles al género en la Región Andina*, Quito, 2004.
- Valdés A. and Guerrero E., *Género en los presupuestos municipales*, Hexagrama consultoras/UNIFEM/UNDP, Santiago, 2001.