

Gender Analysis of Public Expenditure

M. Elena Ruiz Abril

Cairo, 4-5 December 2005

Rabat, 8-9 December 2005

Objectives

- To show how gender analysis of public expenditure can be used as a tool for *engendering* policy formulation
- To present several methods to carry out gender analysis of public expenditure

Gender Analysis of Public Expenditure

- WHAT is it?
 - Gender Budgeting initiatives
 - World Bank experience engendering PERs
- HOW can you do it?
 - Gender disaggregated BIA, program evaluations, gender institutional assessments
- WHY is it important?
 - Tool to influence policies and make them gender sensitive

Gender Analysis of PE

What is it?

Gender Budgeting & Gender Analysis of Public Expenditure

- **Gender budgeting initiatives support civil society and governments in:**
 - Analyzing budgets from a gender perspective
 - Gender analysis of public expenditure
 - Gender analysis of revenue
 - Formulating gender responsive budgets
 - Capacity building of national stakeholders
 - Advocacy

Gender analysis of Public Expenditure

- Gender analysis of public expenditure refers to the analysis of the impact of actual government expenditure and revenue on women and girls as compared to men and boys.
- Its final goal is informing policy by helping governments decide how policies need to be adjusted, and where resources need to be reallocated, to address poverty and gender inequalities.

Why is gender an issue in the analysis of Public Expenditure

- The **budget is a policy statement**, reflecting a government's social and economic priorities, and the fulfillment of its political commitment, in monetary terms, to specific programs and policies.
 - Policy instruments, government expenditures, and revenue collection have different impacts on women and men.
 - Gender analysis of budgets is therefore a way of carrying out gender analysis of policy, and engendering budgets is an avenue to engender policy.

The World Bank (short) experience

- Public Expenditure Reviews
- First wave:
 - Gender as another angle on which to disaggregate traditional variables
 - Gender disaggregated BIA
- Second wave:
 - To examine the allocation, effectiveness, and efficiency of public resources to achieve gender equity and reduce poverty
 - Gender disaggregated BIA; program evaluation; gender institutional assessments

Gender Analysis of PE

How can you do it?

Option 1: Gender disaggregated Benefit Incidence Analysis

■ Objective

- Measure the distribution of a sector expenditure between men/boys and women/girls

■ Rationale

- Is public expenditure equally distributed between men and women?

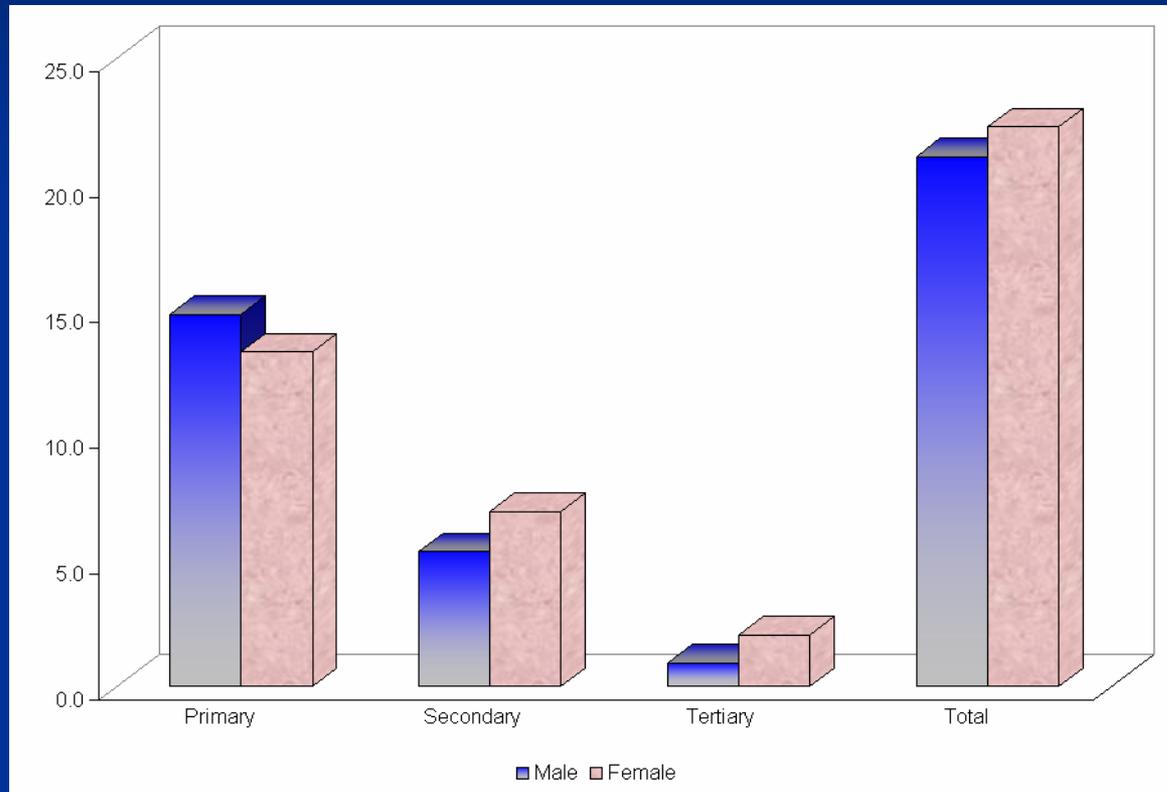
■ Variables used in the Analysis

- Use of public services by men and women (e.g. school attendance by boys and girls)

Gender disaggregated Benefit Incidence Analysis (cont.)

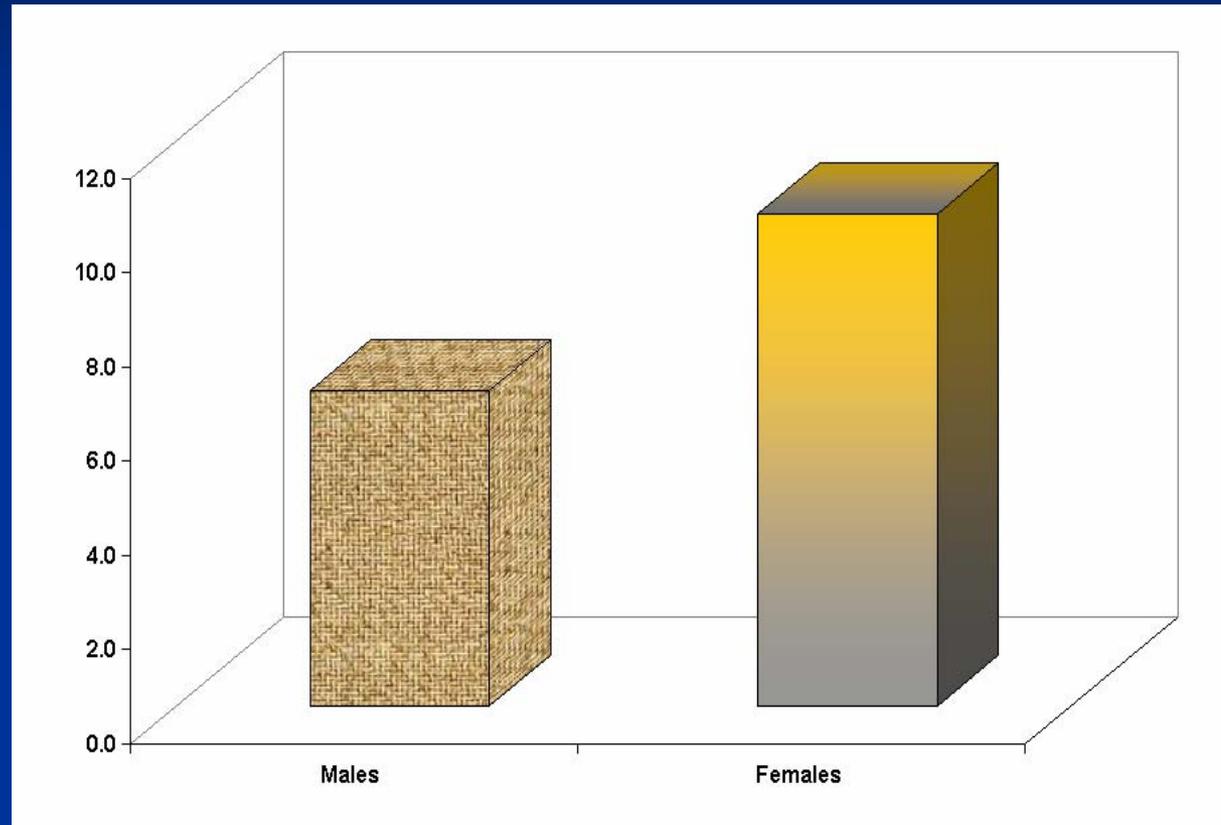
- **What you need...**
 - Data on sector expenditure (e.g. expenditure on primary education; expenditure on health centers, etc.)
 - Data on use of services disaggregated by sex (e.g. use of health centers by men and women; enrolment by sex, etc.)
- **Where to get the data...**
 - From household surveys, census, etc.

Gender disaggregated BIA – Education



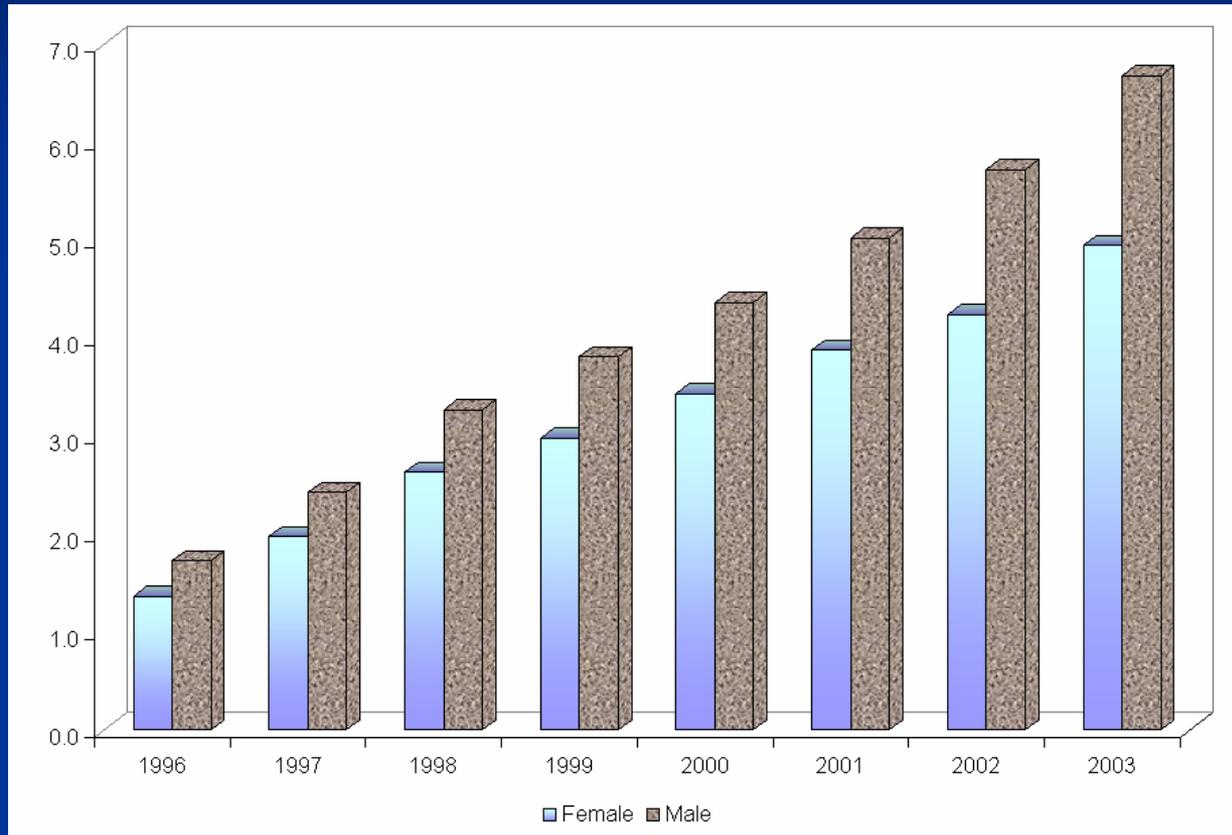
SVG- 2002, Education expenditure by gender

Gender disaggregated BIA - Health



SVG 2002- Expenditure on hospitals, health centers, and community health services by gender

Gender disaggregated BIA- Social Security



SVG-1996-2002 Social Security Benefits by gender

Gender disaggregated BIA: pros and cons

■ Strengths

- Good for advocacy → concise way of expressing gender inequalities in a sector

■ Weaknesses

- Low potential to offer concrete policy recommendations on which to act
- Policy dilemmas: What if PE is not equally distributed between men and women? is that always wrong?
- It only looks at quantitative aspects, it does not deal with the quality of services

Option 2: Program Evaluation

■ Objective

- Analyze the efficiency of programs which are important to achieve specific gender goals

■ Rationale

- Impact of a policy action/program may be different for men and women
- Different patterns of access to services of men and women

■ Variables used in the Analysis

- Supply → program design and implementation features
- Demand → access/use of services by men and women

Program Evaluation (cont.)

■ What you need...

- Data on users of the programs by sex
- Data on program design and implementation

■ Where to get the data...

- Supply aspects → interviews with program officials, secondary sources (e.g. existing impact evaluations)
- Demand aspects → *ad hoc* surveys/ focus groups with beneficiaries, etc.

Program evaluation examples: FHHs in Saint Vincent

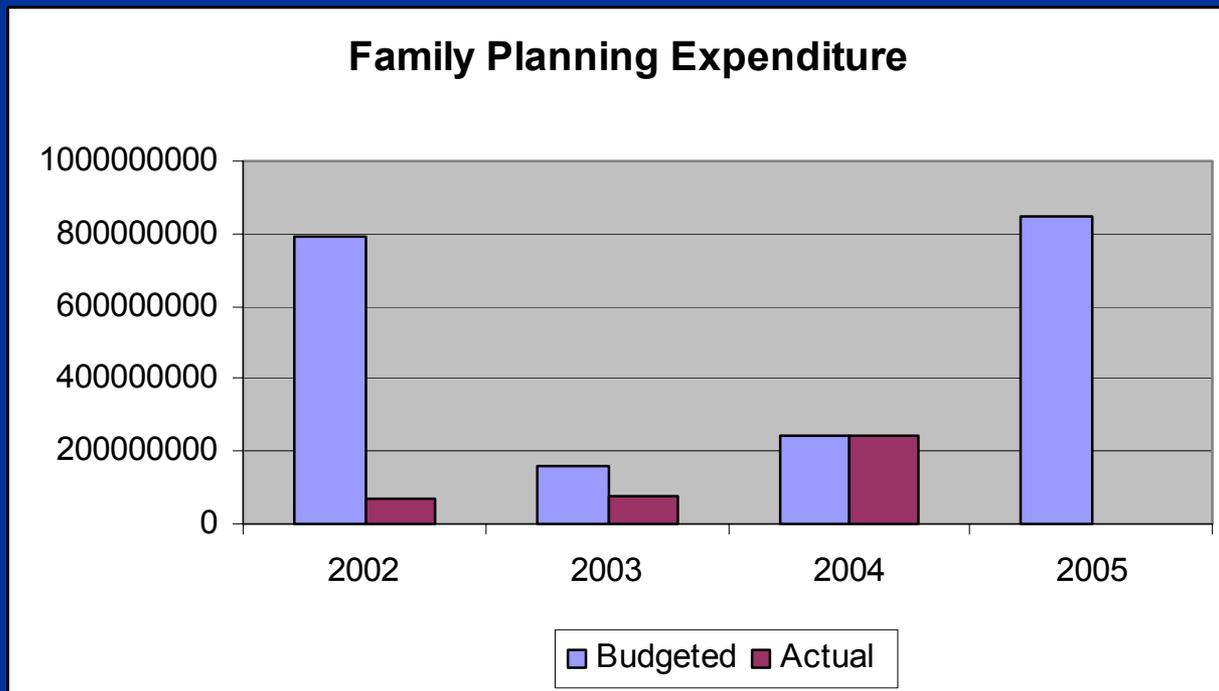
- Female Headed Households were one of the poorest demographic groups in SVG
- Public expenditure for FHHs Income Support Programs - direct transfers; Employment Support Programs – vocational training; and subsidies to day care centers operated privately.
- Findings of the evaluation:
 - Employment support services did not match labor market needs (skills training and business development)
 - The design of the subsidy to day care centers discriminated against FHHs
 - Lack of overall strategy for FHHs led to gaps and overlaps between programs in different government agencies

Program evaluation examples: Boys at risk in Saint Vincent

- Boys in primary education continue to secondary education at a much lower rate than girls (40 percent) in Saint Vincent
- Public expenditure for boys: employment support programs for the unemployed youth
- Findings of the evaluation
 - Program objectives do not match labor market needs
 - Deficient targeting strategy
 - Social and family issues that can prevent the problems that boys at risk faced were not addressed by the programs

Program evaluation examples: Paraguay's Family Planning

- Serious problems of expenditure execution in Paraguay Family Planning program → program resources systematically reallocated to other programs



Program evaluation examples: Paraguay

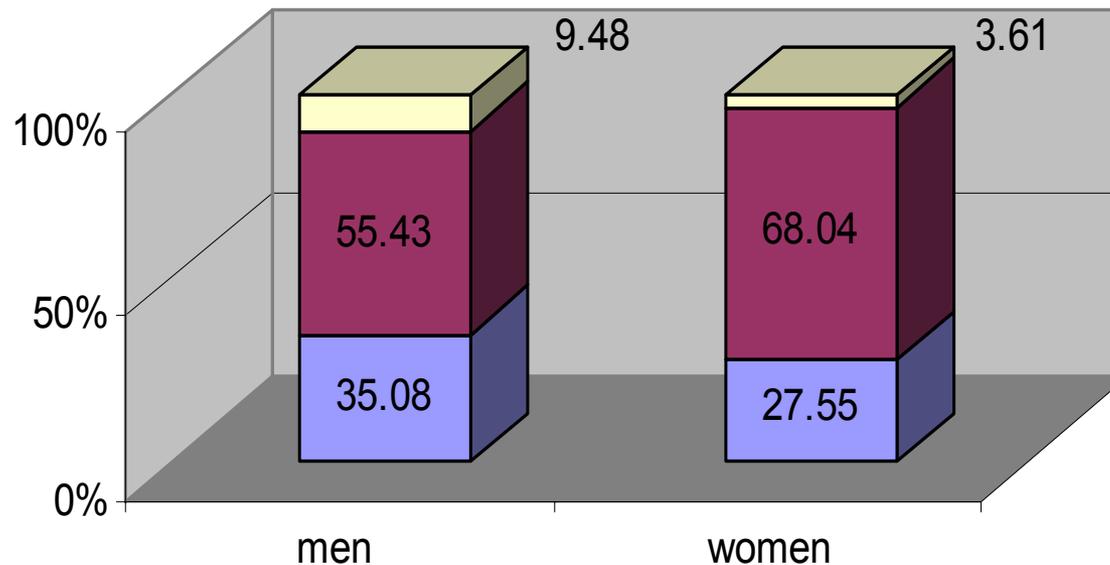
Public Employment Reform

- Cuts in public employment might be less of a problem in Paraguay as women are concentrated in middle rather than low scale positions in the public sector
- Women might however have a difficult transition into the private labor market
- The reform presented an opportunity to increase gender equality in the public labor force:
 - Moving up women from middle to top positions
 - Increasing the gender balance across key sectors

Program evaluation examples: Paraguay

Public Employment Reform

Public Employment by gender and type of job



■ Low positions ■ Medium positions ■ High positions

Program evaluation examples: Cambodia agricultural extension

- While women comprised the majority of farmers, they received just 10 percent of extension services.
- Proposals to change the delivery of extension services:
 - To change the times of extension courses;
 - To employ techniques adapted to potentially illiterate beneficiaries;
 - To increase the proportion of female extension agents; and
 - To provide technical assistance in women specific agricultural tasks.

Program evaluation examples: Ethiopia rural programs (preliminary findings)

- Females heads of household are targeted by extension agents but wives of farmers, the majority of which work in agriculture, receive home economics training
- Women comprise just over 10 percent of the enrollment in agricultural colleges (the extension agents academic program)
- Low capacity of the Ministry of Agriculture to address gender issues:
 - Women's Affairs Office
 - Information systems unable to collect/analyze gender disaggregated data

Program evaluation: pros and cons

■ Strengths

- High potential to offer concrete, workable policy recommendations
- It analyzes the causes of gender inequalities in the use of services (e.g. gendered patterns of access to public services)
- Political power of the findings largely depends on the choice of the program – e.g. strong in the case of family planning in Paraguay

■ Weaknesses

- Micro-data on projects are difficult to obtain → **costly**

Option 3: Analysis of Gender Specific Public Expenditure & Gender Institutional Assessments

■ Objectives

- To assess the adequacy, vulnerability over time, and suitability of public expenditure allocated to address gender issues
- To rationalize public expenditure of National Gender Machineries

■ Rationale

- Optimizing resources already allocated to gender

■ Variables used in the analysis

- Adequacy of the GSPE level to meet gender problems
- Extent to which GSPE is well targeted to address national gender priorities
- Extent to which GSPE relies on external funds
- Extent to which GSPE is vulnerable to budget cuts, etc.

Analysis of GSPE & Gender Institutional Assessments (cont.)

- **What you need...**
 - Expenditure on gender specific programs /institutions (e.g. budget of the National Council for Women; budget of the maternal mortality program at the Ministry of Health, etc.)
 - Quantitative and Qualitative analysis of how those resources are spent
 - Program Evaluation (previous slides)
 - Institutional Assessments

Gender Institutional Assessments

Objective of the analysis

- Is the Gender National Machinery using efficiently its resources to achieve national gender goals?

Variables

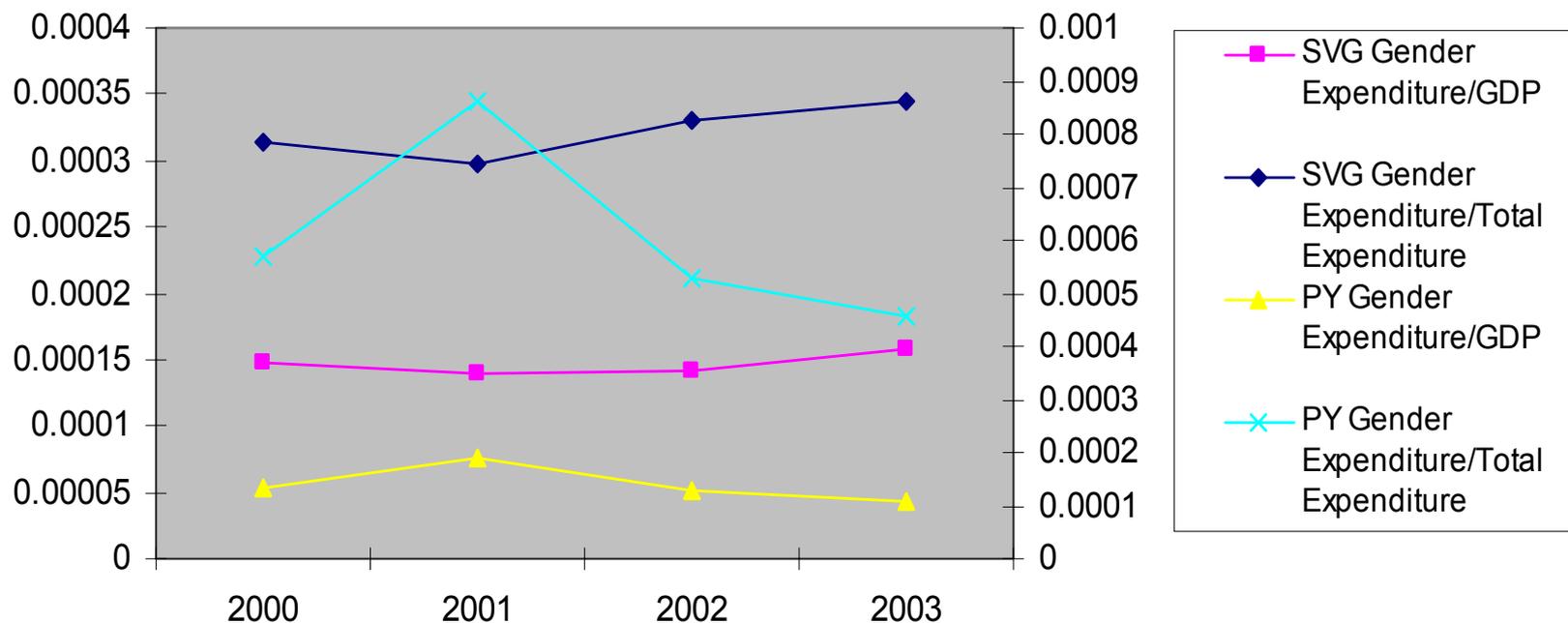
- Mandate & Role
 - implementing/ policy advisor/ lobbying
- Resources
 - Human – staff right skills mixture
 - Financial (level; use; sustainability)
- Organizational structure
 - Internal – alignment to national priorities
 - External – role of the institution in government decision making
- Others

Gender Institutional Assessments (cont.)

- **Where to get the data...**
 - Interviews with program officials using protocols specially designed to assess institutional issues (variables in previous slide)
 - Expenditure data:
 - Total budget of the institution
 - Expenditure by departments
 - Sources of funding by program (donor/regular)
 - Expenditure by categories (recurrent against capital)

Gender Institutional Assessments: Examples

Saint Vincent's Gender Affairs Department and Paraguay's National Women's Secretariat Budgets



Gender Institutional Assessment

Example: Saint Vincent

- **SVG Gender Affairs Department resources have increased steadily over time but are:**
 - Insufficient (two times lower than those of the Botanic Gardens Dept.)
 - Inefficiently allocated between project management and policy advice; and
 - Unsustainable as they rely mainly on donor contributions
- **GAD needs to re-define its role and position in the Government in order to influence policy formulation**

Gender Institutional Assessment

Example: Paraguay

- National Women's Secretariat resources:
 - have decreased significantly in the last five years both as a proportion of GDP and of total expenditure
 - are inefficiently allocated: low allocation to health programs to address national needs (specifically high fertility and maternal mortality)
- Inter-institutional position of the Secretariat within government structure recently downgraded

Gender Institutional Assessments: pros and cons

■ Strengths

- Opportunity to improve the use of already existing gender resources
- Allows to underscore problems of low capacity of National Gender Machineries (in relation to other government areas) using international comparisons of quantitative indicators (slide 27)

■ Weaknesses

- It can become a “double edge sword” → trade offs regarding efficiency of expenditure
- Lack of international benchmarks

Gender Analysis of PE

Why is it important?

Conclusion

- Another tool to look at gender issues in policy analysis
- Strong evidence on gender inequalities (BIA + gender specific expenditure) that can be used for advocating changes in policies
- Offers insights on how to spend better (not necessarily more) to achieve gender equality (Program Evaluation + Institutional Assessments)
- Link to subsequent higher budget allocations for gender is yet to be seen

Next Steps: The Challenges of Implementation

- Formulation of gender sensitive budgets against gender analysis of public expenditure
 - Egypt's experience mainstreaming gender in the National Plan

Questions for the audience

- Do you see yourself using any of these techniques in the future in your organization?
- Which one and for which purpose?
- What would your organization need to be able to carry out the analysis successfully?
 - Further training in ...
 - Hiring external experts for...
 - Financial resources for
 - Other ...