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# Gender Analysis of Public Expenditure

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Gender Budgeting Workshop  
Rabat, 21 et 22 October 2008

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# Objectives

- To show how gender analysis of Public Expenditure can be used as a tool to 'engender' policy formulation
- To present several techniques to conduct gender analysis of public expenditure based on the World Bank experience

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# Gender Analysis of Public Expenditure:

## The presentation

- What is it?
  - Gender budgeting initiatives
  - World Bank experience engendering Public Expenditure Reviews
- How to do it?
  - Gender disaggregated benefit incidence analysis; program evaluation; gender institutional assessments
- Why is it important
  - Tool to engender policy

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# Gender Analysis of Public Expenditure

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**What is it?**

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# Gender budgeting initiatives and gender analysis of public expenditure

- Gender budgeting initiatives support governments and civil society in:
  - Analyzing budgets from a gender perspective
    - **Gender analysis of public expenditure**
    - Gender analysis of revenue
  - Formulating gender responsive budgets
    - Advocacy, research, changes to budget process, etc

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# Gender analysis of public expenditure

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

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# 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 impact on men and women
  - Gender analysis of budgets is a way of carrying out gender analysis of policy and 'engendering' budgets an avenue to engender policies

# The World Bank experience in the area of Gender Budgeting

## ■ Public Expenditure Reviews

### □ First wave

- Gender as another angle on which to disaggregate traditional variables using Gender Benefit Incidence Analysis

### □ Second wave

- To examine the allocation, effectiveness and efficiency of public resources to achieve gender equality and reduce poverty
- Gender BIA; program evaluation; gender institutional assessments
- Saint Vincent and the Grenadines; Ethiopia; Paraguay
- Capacity building in Congo, Rwanda, Liberia

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# Gender analysis of public expenditure

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## HOW TO DO IT?

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# Option 1: Gender disaggregated benefit incidence analysis

## ■ Objective

- Measure the allocation of a sector public resources between men/boys and women/girls

## ■ Rationale

- Is public expenditure fairly distributed between men and women?
- Does the allocation of public resources reflect the needs of men and women?

## ■ Variables used in the analysis

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

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# Gender disaggregated BIA (cont.)

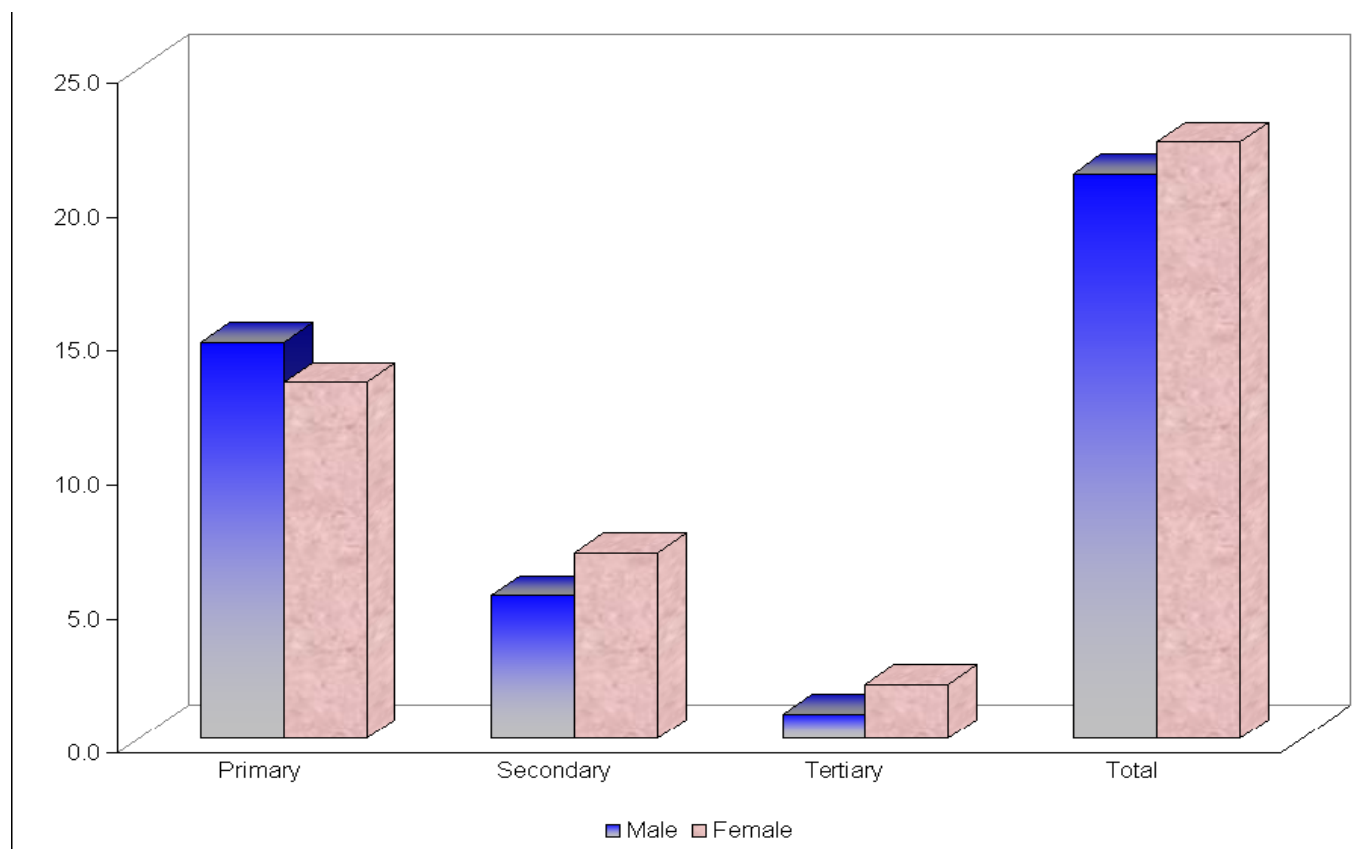
## ■ Data needs

- ❑ Budget data on sector expenditure (e.g. expenditure in primary education; expenditure on health centers; etc.)
- ❑ Data on the use of the same services disaggregated by sex (enrolment by sex; men and women's use of health centers; etc.)

## ■ Data collection strategy

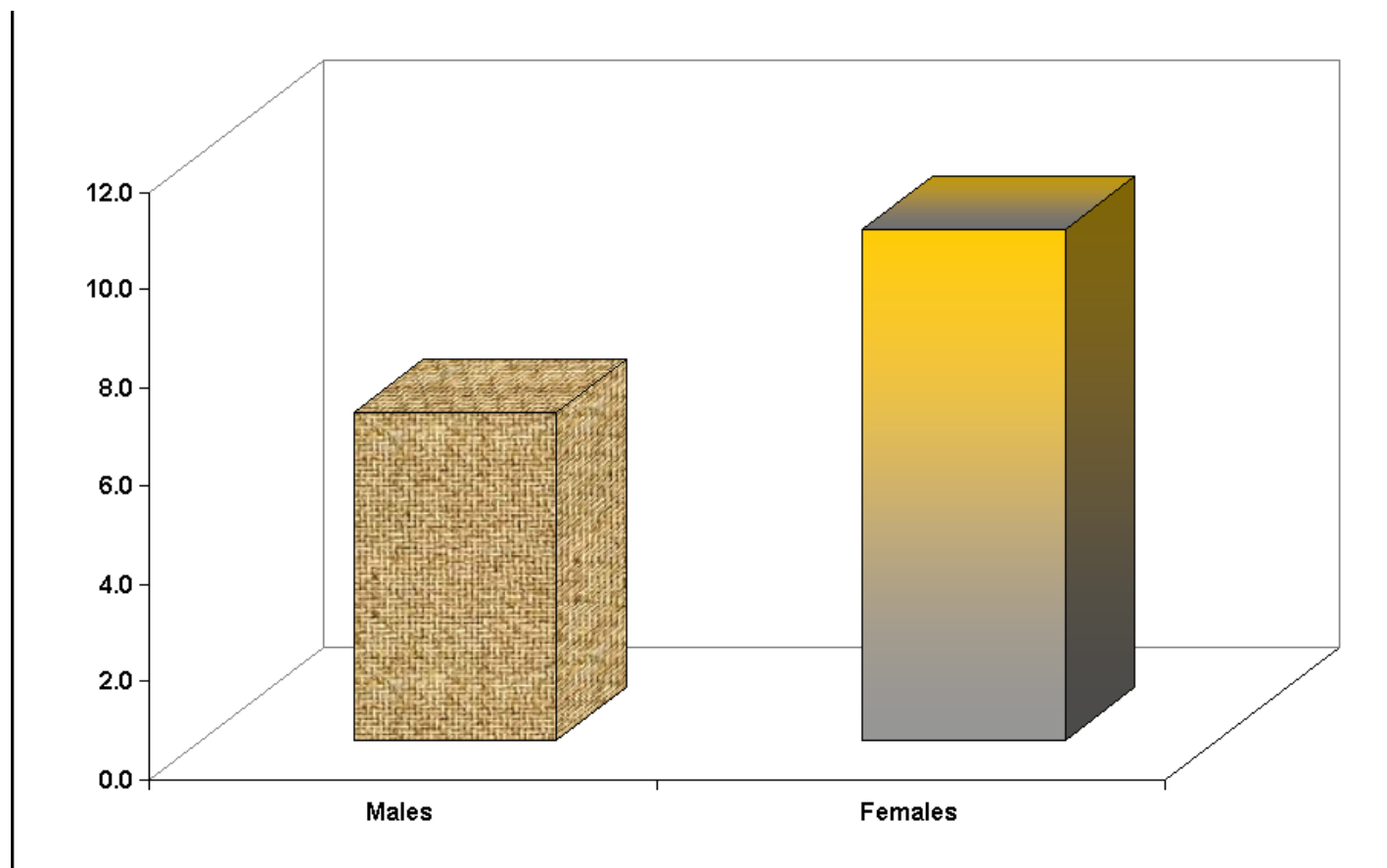
- ❑ Budget data + Household surveys, censuses, sector surveys, etc.

# Gender disaggregated BIA – Education sector in Saint Vincent



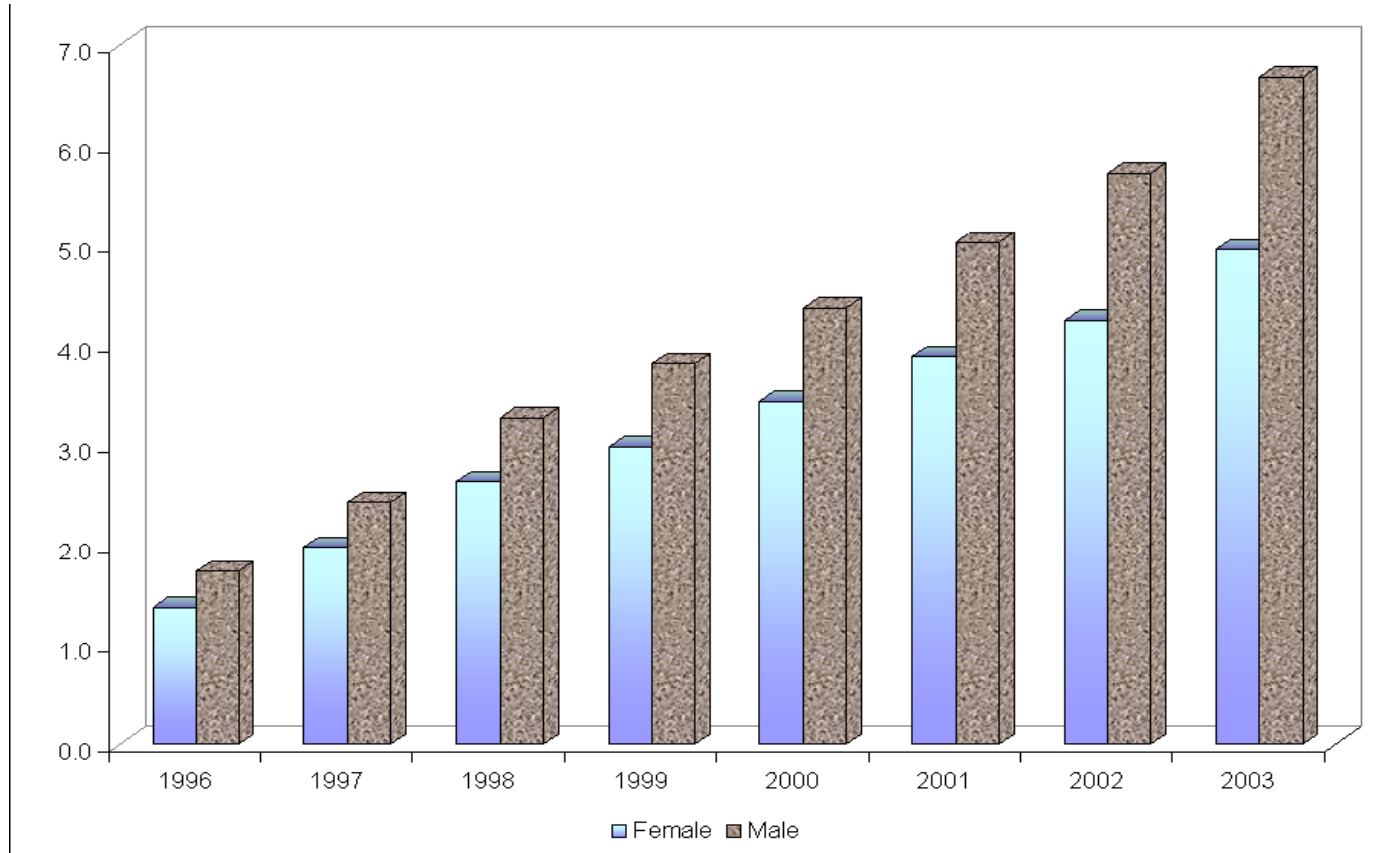
Saint Vincent and the Grenadines, 2002

# Gender disaggregated BIA – Health sector in Saint Vincent



SVG, 2002, Expenditure in hospitals, health centres, and community health services by gender

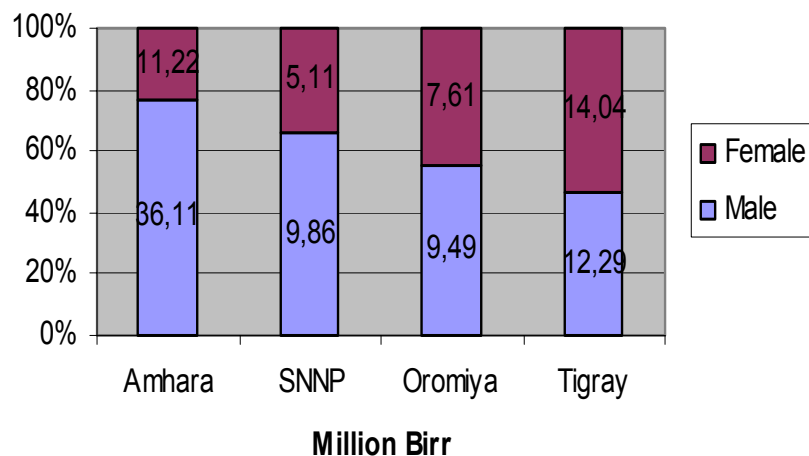
# Gender disaggregated BIA – Social Security in Saint Vincent



SVG, 1996-2002, Social Security Benefits by Gender

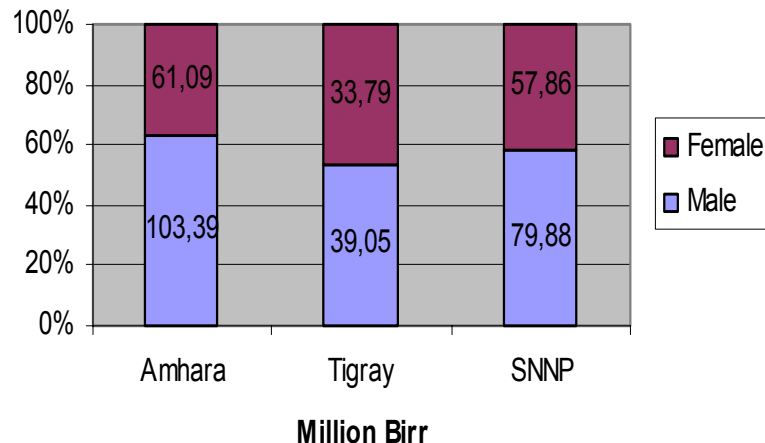
# Gender disaggregated BIA – Social Protection in Ethiopia

Other Food Security Expenditure by Sex 2004-2005



Expenditure on Community Driven Development Projects

Safety Nets Expenditure by Sex 2004-2005



Expenditure in direct transfers & public works

# Gender disaggregated BIA – Strengths and Weaknesses

## ■ Strengths

- Good for advocacy – concise way of presenting information about gender inequalities in just one shot
- Allows for a more sophisticated analysis crossing gender with other variables (age, race, income level, etc.)

## ■ Weaknesses

- Low potential to offer concrete recommendations on which to act
- It only looks at quantitative data, it is not concerned with the quality of services

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**5 minutes for questions about  
Gender disaggregated BIA !!**

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# Option 2: Program Evaluation - gender analysis of programs

## ■ Objective

- To analyze the efficiency of programs (expenditures) which are important to achieve specific gender goals

## ■ Rationale

- Impact of a program may be different for men and women
- Men and women's different access to public services

## ■ Variables used in the analysis

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

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# Gender Program evaluation (cont.)

## ■ Data needs

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

## ■ Data collection strategy

- ❑ Supply side: interviews with program officials; secondary sources (existing program evaluations)
- ❑ Demand side: program records of beneficiaries; ad hoc surveys; focus groups with beneficiaries

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# Program evaluation example 1: Female Headed Households in Saint Vincent

- Step 1: Identify gender issue:
  - FHHs were one of the poorest population groups in SVG
- Step 2: Identify public expenditure to address the issue – programs for FHHs:
  - Income support programs– direct transfers;
  - Employment support programs – Vocational Training
  - Subsidies to daycare centers privately operated

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# Program evaluation example 1: Female Headed Households in Saint Vincent (cont.)

- **Step 3: Analyze the efficiency of the programs/ expenditures:**
  - ❑ 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

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# Program Evaluation Example 2: Boys at risk in Saint Vincent

- Step 1: Identify gender issue
  - Dramatic drop out of boys between primary and secondary school (as much as 60 percent)
- Step 2: Identify public programs/expenditures to address the issue
  - Employment support programs for the unemployed youth
- Step 3: Analyze the efficiency of the program
  - 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

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# Program Evaluation Example 3: Ethiopia's Rural Extension Program

- Step 1: Identify the gender issue
  - Low productivity of female farmers
    - Women contribute between 40 and 77 percent of agricultural labor in Ethiopia - depending on the type of activity. But they access extension services in a proportion of 9 to 26 percent.
- Step 2: Identify programs/expenditures to target the issue
  - Agricultural extension program
  - Technical and Vocational Education

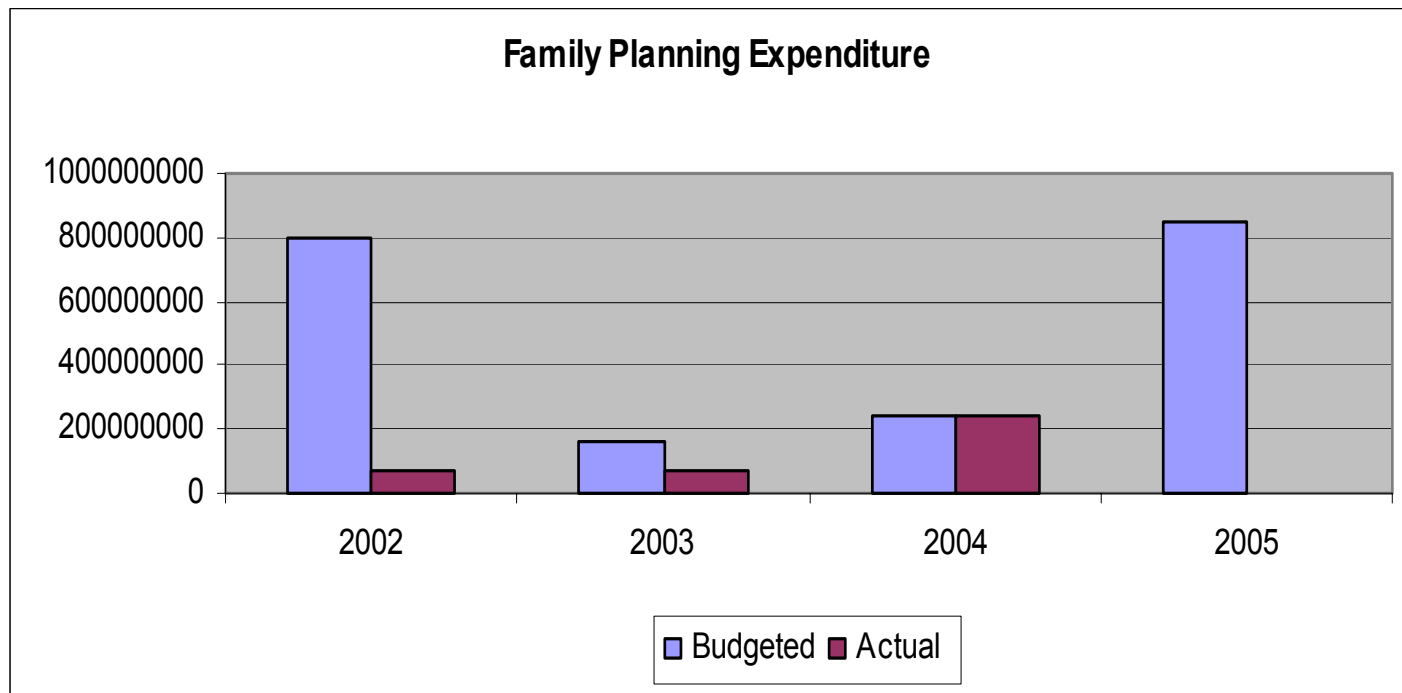
# Program Evaluation Example 3: Ethiopia's Rural Extension Program (cont.)

- Step 3: Analyze the program/expenditure
  - Inadequate targeting of women by the program leads to female farmers limited training in productive techniques
    - Female Heads of Household versus wives of farmers
  - Change from 'home agent' to 'health agents' will increase the gender gap in access to productive training
  - Causes of the problem:
    - Wrong assumptions about women's role in agriculture and intra-household dynamics
    - Low numbers of female extension agents (just 12%)
    - Rigid design of extension packages – FHHs risk averse to take on large loans. Smaller loans only for land owning households.

# Program Evaluation Example 4: Paraguay

## Family Planning Program/expenditure

- Serious problem of expenditure execution in the family planning program
- Inadequate allocation of resources within the program did not allow for the execution of this key expenditure for gender equality



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# Program Evaluation: Strengths and Weaknesses

## ■ Strengths

- ❑ High potential to offer concrete recommendations on which to act
- ❑ It analyzes the causes of gender inequalities in access to public services
- ❑ Political power of the findings largely depend on the use of the analysis

## ■ Weakness

- ❑ Costly due to ad hoc data gathering

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**5 minutes for questions on  
gender program evaluation!!**

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

## ■ 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

- Optimization of 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
- Other

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# Gender institutional analysis

## ■ **Objective of the analysis**

- Is the national gender machinery using its resources efficiently to meet 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

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# Gender institutional analysis (cont.)

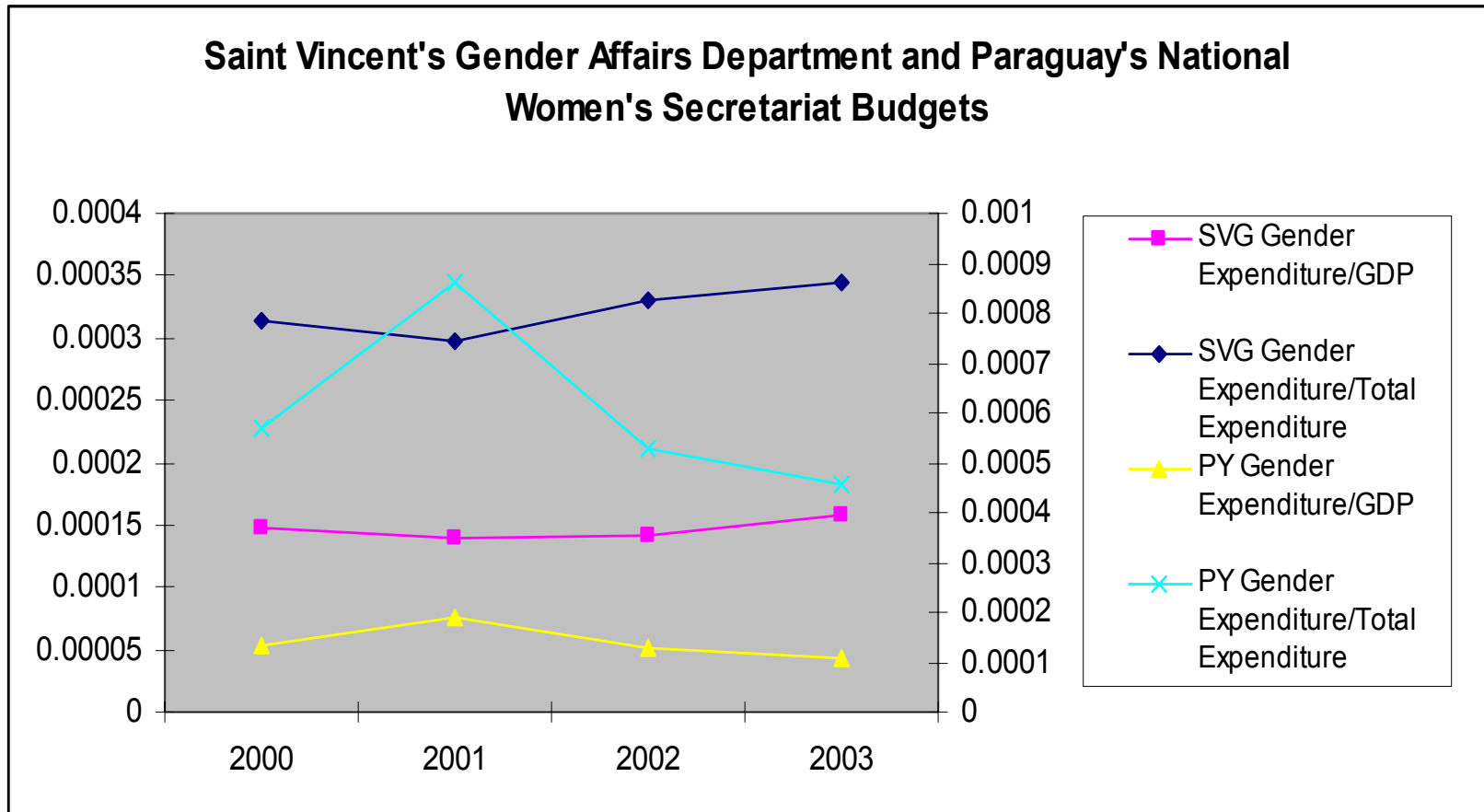
## ■ Data needs

- Information to feed the variables in previous slide
- Expenditure data
  - Expenditure by departments
  - Total budget of the institution
  - Sources of funding by program (donor/regular)
  - Expenditure by categories (recurrent against capital)

## ■ Data gathering strategy

- Interviews with program officials using protocols specially designed to assess institutional issues

# Example of gender institutional analysis



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# Example of gender institutional analysis – 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

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# Example of Gender Institutional Analysis

## – 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

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# Gender Institutional Analysis: Strengths and Weaknesses

## ■ 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

## ■ Weaknesses

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

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# Gender Analysis of Public Expenditure:

## 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 budget reallocations for gender is yet to be seen

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**Thank you!!**

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# Questions for the audience

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