



Engendering EU General Budget Support:

Gender Responsive Budgeting as a tool for fostering gender equality in EU partner countries

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The purpose of this briefing paper is to contribute to the capacity building of women organizations and gender advocates, and promote their involvement in Aid Effectiveness processes. It is one of a series of briefing papers developed by WIDE on aid effectiveness from a European, gender, perspective.

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Purpose of briefing paper

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The briefing paper begins by defining “general budget support”. It then highlights main concerns and opportunities that increased general budget support present for gender equity work in EU partner countries. Next, it defines what is meant by gender responsive budgeting. The following section highlights what EU gender equity commitments and attempts to operationalize them have to say about how gender responsive budgeting could be used as a tool to engender general budget support: in the 2007 Commission *Communication on Gender Equality and Women’s Empowerment in Development Cooperation* commitments, the 2008 *Programming Guide for Strategy Papers: Gender Equality Programming Fiche*, the 2008-2011 EU-sponsored UNIFEM project *Integrating gender-responsive budgeting into the aid effectiveness agenda*, and the (2009 draft of the) *EU Gender Action Plan*. The concluding sections summarize lessons learnt re: engendering general budget support via GRB, and provide recommendations for action that women’s organizations could advocate and/or support.

General Budget Support: A “New” Aid Modality

Since the Monterrey Consensus (2002) and the Paris Declaration on Aid Effectiveness (2005), the EC and Member States have been introducing “new aid modalities” in their development policies and instruments. These are a set of commitments of the international community to eradicate poverty and achieve the Millenium Development Goals (2000). They include the establishment of some overarching principles to redefine the relationship between donor and recipient countries, and the channeling of aid through relatively recently introduced mechanisms – or modalities.

General budget support (GBS) is one of the aid modalities enforced by the EC after the Paris Declaration. It constitutes a shift of focus away from project- toward programme-based assistance. GBS monies are channeled by EC or MS donors directly into the partner country government budget, and are not earmarked to specific expenditures. Internally, the EU has targeted to reach 50% of EU ODA through budget support by 2010.¹

GBS is meant to foster enacting the Paris Declaration principles, including:

- **Alignment:** Donors are to align their strategies and activities with partner country development frameworks, ensuring that donors base their overall support on recipient countries’ national development strategies, institutions and procedures.
- **Ownership:** Recipient countries are to exercise effective leadership over development policies and strategies. Programme-based aid is intended to foster this, among other things, by being more predictable, fostering state and administrative capacities, and leading to stronger systems of domestic accountability. The EC stated aim in increasing GBS is to help partner countries ultimately become independent of international aid.²

Budget support is a package

The exact arrangements for budget support differ according to the aid agency and recipient country involved, but the typical budget support 'package' includes:

- **A basic agreement between the recipient country and its aid partner(s), about the country's aid strategy and objectives, and the general principles of development cooperation.** A memorandum of understanding (MOU) often reflects this agreement and sets out arrangements for regular dialogue about general policies and the use of budget support.
- **Specific agreements about the amount of budget support to be provided and the conditions for its disbursements.** There is usually a general condition that the government will adhere to the broad understandings set out in the MOU, plus specific conditions for the disbursement of budget support funds. The specific conditions usually include a set of agreed policy measures that the government will undertake. Some donors link at least part of their disbursement to the achievement of set performance targets.
- **An agreed procedure for monitoring and review of performance.** This monitoring and review is integrated into the preparation of subsequent installments of budget support. Among other things, the budget support donors monitor the country's public expenditures as a whole.
- **Budget support is accompanied by programmes to strengthen public finance management,** and budget support donors systematically monitor the quality of the country's public finance management systems.
- Budget support is **accompanied by technical assistance and support for capacity development,** especially to strengthen planning, budgeting and financial management.

(IDD & Associates (2007). Joint Evaluation of General Budget Support 1994-2004 – Briefing Paper: General Questions and Answers, Glasgow: DFID; included in Social Watch (2007) *Budget Support: As good as the strategy it finances.*)

GBS and gender equality in EU Partner Countries: Concerns & opportunities

The shift from project to programme-focused aid raises some concerns for how EU donors can support gender equity in partner countries:

- Will increasing GBS portion of development assistance mean reduced other funds for gender equity work - especially for targeted gender projects? Will potentially reduced specifically-targeted projects endanger gender equity advances already made in EU partner countries, and/or preclude new ones?
- How to ensure that GBS funds per se are gender-equitable in design and implementation – to ensure that donors do not say: "We gave that aid as budget support, so gender did not come into play". This is the focus of this briefing paper.

GBS - and aid effectiveness policies of which it is part - may also present some opportunities for fostering gender equity:

- They express public policy commitments (on paper) to gender equity, including achieving the Millennium Development Goals.

- GBS, and related budget reform processes, are becoming more transparent and participatory, providing space for CSOs, gender advocates and women’s organizations to advocate for more accountability.

Ensuring that GBS fosters rather than “disappears” gender equity concerns entails a **strong focus on partner country processes. Gender responsive budgeting is a valuable tool to ensure that GBS processes foster, rather than disappear, gender equity concerns in EU partner countries.**

Gender Responsive Budgeting

GRB can function as a “**gender reality check**” on the talk that has surrounded the Paris Declaration, including GBS. It can be a useful **weapon against “policy evaporation”**, the tendency for gender equity policy commitments on paper to be forgotten when the policy is implemented. It can help **ensure that the focus is not simply on technical mechanisms of aid, but also on what results the aid has.**³

GRB encompasses a range of possible activities that focus on the question of how the government budget does or can advance gender equality. It is proactive, not just reactive – helping shape budgets before they are finalized. Ideally, GRB spans the full process from assessing the situation to be addressed, devising policy and programmes, allocating budgets, and implementing and reviewing implementation and its impacts.

One World Action – a member of the GAD network/WIDE UK national platform - has developed an overview of what a comprehensive GRB process entails, listing questions to be addressed at each phase by donors, governments and CSO/women’s organizations..

Gender Responsive Budgeting: Key questions⁴

	Donors	Government	Civil society – Women’s organizations
Stage 1 Identification & Budget Preparation Gender aware policy appraisal & gender disaggregated beneficiary assessment	<ul style="list-style-type: none"> • Does the donor have an overall gender policy? • Is the country gender strategy paper and/or Joint Assistance Strategy coherent with the gender policy? • Are these documents informed by gender disaggregated statistics and information? 	<ul style="list-style-type: none"> • Does the government collect gender disaggregated statistics and information? • Has the government developed gender sensitive indicators that would show progress towards gender equality and women’s empowerment? • Are the national development plans outlined in PRSPs gender sensitive? • Are the key gender policy priorities integrated in fiscal planning tools such as the Medium-Term Expenditure Framework (MTEF)? • Is the allocation through the MTEF/LTEF/PRSP gender disaggregated? 	<ul style="list-style-type: none"> • Have women’s organisations analysed government and donor national policies? • Have they proactively engaged with government and donors to improve the collection and analysis of gender statistics? • Have they engaged women to ensure that marginalised voices are reflected in statistics and information?
Stage 2 Commitment	<ul style="list-style-type: none"> • Are donor policy commitments to gender equality and women’s 	<ul style="list-style-type: none"> • Are government commitments to gender equality and women’s 	<ul style="list-style-type: none"> • Are women’s organizations tracking aid flows into their countries?

<p>and Enactment</p> <p>Gender Disaggregated Public Expenditure Analysis</p>	<p>empowerment reflected in discussions and allocation of aid?</p> <ul style="list-style-type: none"> • Is aid earmarked for implementation of gender specific commitments? • Is there donor support for national gender machinery and women's organizations? • Were women's organizations consulted before commitments were made? • Are disbursements to government timely and adequate? 	<p>empowerment reflected in discussions and allocations of resources?</p> <ul style="list-style-type: none"> • Are funds earmarked for programmes aimed at supporting women's empowerment and/or for women's organizations? • Were women's organizations consulted on budget allocations? 	<ul style="list-style-type: none"> • Are women's organizations trying to influence budget planning in their countries? • Are women's organizations holding their public officials to account by lobbying their MPs to ask questions when the budget is tabled in Parliament?
<p>Step 3</p> <p>Implementation and Monitoring</p> <p>Gender Disaggregated Analysis of Impact</p>	<ul style="list-style-type: none"> • Do donors have monitoring mechanisms to track aid? • Do these measure the gender impact of their allocations? • Are donor gender working groups supported and consulted during the implementation and monitoring stage? • Are donors investing in civil society to build capacity for budget monitoring? 	<ul style="list-style-type: none"> • His is the gender impact of the budget measured vis-à-vis gender policy priorities? • Are gender indicators used to measure the performance of the budget? • Is monitoring of allocations to gender programmes/project part of the periodic review processes, i.e. PRSP, JAS, BSR, MTEF reporting? 	<ul style="list-style-type: none"> • Are women's organizations actively monitoring government performance? • Are they engaged in advocacy, including using the media, for raising awareness of poor/good performance? • Are they mobilizing citizens to engage in budget processes?
<p>Stage 4</p> <p>Audit and Assessment</p> <p>Gender Aware Appraisal and Gender Responsive Budgeting</p>	<ul style="list-style-type: none"> • Are donors assessing the performance impact of the budget? • Have they met their gender policy commitments? 	<ul style="list-style-type: none"> • Is the government attempting to assess how the budget has addressed key gender issues reflected in the departmental strategy plans and integrated into the MTEF? • Is there a framework/process for consulting with civil society organizations for feedback? • What are good practices / lessons learned to inform the next stage of the process? 	<ul style="list-style-type: none"> • Are women's organizations refining their strategies on how to influence budget planning in the future? • Are women's organizations advocating for more gender sensitive impact assessment and better use of gender disaggregated data for the next cycle? • How can women ensure government accountability for gender equality?

EU gender equity commitments and their Implementation to date: Approaches to GBS and GRB

2007 Commission Communication on Gender Equality and Women's Empowerment in Development Cooperation

Prior to GBS introduction, as most partner countries, EC and MS donors signed a number of international agreements containing commitments to gender equity and women's empowerment.: These include: the Beijing Declaration and Platform for Action, the Convention on the Elimination of all Forms

of Discrimination Against Women (CEDAW), and the Millennium Development Goals (MDGs). As noted above, the MDGs are the purported end goals of the new principles and related aid modalities, including GBS and related budgeting processes.

More recently, the EU has reiterated its commitments on gender equality in partner countries in the 2007 Commission *Communication on Gender Equality and Women's Empowerment in Development Cooperation*. This Communication is a political statement, placing "gender equality and women's empowerment firmly in the EU context and is intended to send the strongest possible signal regarding the importance of Gender Equality in all future EU development cooperation efforts".

The *Communication* notes that "the increased use of budget support as a major instrument of aid delivery raises the questions of how to promote Gender Equality within and through such a programme. To achieve this, it is vitally important to ensure that partner countries' budgets are gender responsive".⁵ Essentially, thus, the *Communication* argues for gender responsive budgeting to be carried out in partner countries as a way of ensuring gender equity concerns are addressed in GBS processes.

This is an important comment, as government budgets are the largest source of financing for gender equality and women's empowerment for most aid recipient countries. It is through national and sub-national budgets that governments' promises are translated into practical policies and programmes.⁶

The *Communication* argues that ensuring that partner countries' budgets are gender sensitive requires:

- ◇ focus on gender awareness and gender mainstreaming in the budget process at national and local levels,
- ◇ re-prioritisation of expenditure and re-orientation of programmes within sectors to achieve gender equality and human development,
- ◇ monitoring of government revenue and expenditure to ensure that the inequality gap between females and males is in fact decreasing.

Within this broader framework, the *Communication's* main specific proposal is to link the disbursement of variable GBS tranches to improvements in gender disaggregated indicators, and support the development of indicators and "relevant data" that can track changes in gender equality - and which can be linked to the disbursement of variable tranches.

The proposal to support the development of "relevant data" – understood to include gender disaggregated statistics – is welcome. The proposal to link disbursement of aid monies to the fulfillment of "conditionalities" is problematic.

GBS is paid out in the form of tranches, some fixed, some variable – though the trend is moving toward only fixed ones. The disbursement of fixed tranches are given in full - or not - depending on performance against agreed indicators. A portion of variable tranches is paid based on performance against a different set of indicators from those applied to fixed tranches.

Tranche indicators are essentially "conditionalities". Engendering variable tranche indicators is not the best approach for GRB advocates to focus on engendering GBS. Firstly, variable tranches are being phased out. Secondly, they are another way of "ghettoizing" gender to "peripheral" rather than "central" matters – in this case GBS ones. Thirdly, as a general principle, aid disbursements should not be based on the meeting of donor conditionalities. Rather, other approaches should be used to help ensure progress on gender equity and women's empowerment. Helping ensure the mainstreaming of gender responsive budgeting practices in partner country processes is one of fostering gender equity while simultaneously fostering "ownership" of it.

2008 EC Programming Guide for Strategy Papers: Programming Fiche Gender Equality

One first step the EC has taken toward implementation of *Communication* commitments was the November 2008 publication of a *Programming Guide for Strategy Papers* with a Programming Fiche related to Gender Equality. It highlighted three possible entry points for gender equality in relation to GBS:

- Gender-sensitive indicators could be used in the design of the fixed and variable tranches
- Gender-sensitive indicators can be introduced in the annual Performance Assessment Frameworks (PAF)
- Joint Assessment Reviews (JAR) in GBS and Sector Budget Support (SBS) could be “engendered”

These suggestions, go beyond the ones proposed in the Communication.

The *Programming Guide* first proposal suggests extending “gender conditionality” to the disbursement of fixed, as well as variable, GBS tranches. Instead of extending gender conditionalities, WIDE supports the extension of the use of gender sensitive budgeting practices as the preferred method for engendering general budget support in a way owned by partner country actors.

Per the second *Programming Guide* proposal: Where GBS is significant, donors generally do their monitoring through a set of indicators, the Performance Assessment Framework (PAF). These are set out in a partnership memorandum between the donors and the recipient country. Country performance is evaluated yearly based on these indicators. Gender responsive budgeting processes could be useful in engendering these indicators. Thirdly, as the *Programming Guide* notes, Joint Assessment Reviews (JAR) in GBS and sector budget support (SBS) could be used as opportunities to take gender expertise on board, as well as sector specialists and macroeconomists, to assess (sectoral) effects on gender equality.

These suggestions were made without mentioning of EU / MS commitments to supporting partner country gender responsive budgeting processes per se. Ideally, the proposed second and third interventions would be a part of a coherent GRB process integrated into general budget support, rather than uncoordinated, ad hoc, interventions.

2008-2011 EC-funded UNIFEM project: Integrating Gender-Responsive Budgeting into the Aid Effectiveness Agenda

Shortly before the *Programming Guide for Strategy Papers* was issued, the EU took another step toward supporting in-partner country GRB as the primary tool to engender GBS. It funded a three-year UNIFEM project entitled *Integrating gender-responsive budgeting into the aid effectiveness agenda*. The first phase – now completed - investigated how GRB tools and strategies were utilized in the context of EU current use of GBS and associated new types of partner country budgeting. The aim was to deepen the understanding of national partners and EU decisionmakers of the opportunities for using GRB to enhance accountability to gender equality in aid effectiveness. The study’s main conclusions will be used to select five out of the ten case study countries that will be given technical support to enhance their GRB processes. Some of these lessons learnt about how gender responsive budgeting can be

integrated systematically into general budget support are highlighted here. Recommendations as to actions that gender advocates could take in connection with them are included in the concluding section:

EU donors and gender agendas

The UNIFEM study concluded that most of its **ten country case studies did not give any indication of EU donors driving the broader “gender agenda”**. **Spain is the exception**, as the only OECD donor to have gender as its preferred lead sector, though it is not one of the main EU donor proponents of GBS. However, as the study also noted, when it came specifically to gender responsive budgeting efforts in partner countries, **the EC and MS, not partner governments, have been the main driving force behind gender responsive budgeting efforts..**

The UNIFEM study also notes that **EU donors tended to channel more of their specifically gender-related funds to CSOs, rather than to governments.** (It unfortunately does not tell us if these funds have been cut as a result of increasing GBS funding.) **WIDE notes that this may suggest that, while EU donors play an important role in fostering gender responsive budgeting processes in partner countries, their main focus to date may have been on the role of CSOs rather than on government actors in this connection. While CSO support is welcome, this point suggests that EU donors have scope to increase support for directly “mainstreaming” gender responsive budgeting in government processes – including in GBS, and budgeting developed to monitor it.**

Country development priorities

Development strategies encompass poverty reduction strategies and other medium-term national plans and sectoral programmes as well as globally agreed commitments, such as the MDGs. Country development priorities are visible in analysis, policy formulation, resource allocation, and implementation. EU development assistance is given, in principal, in cases where donors agree with partner countries’ development priorities as put forward in their development policies. This is especially true for GBS. EC aid – including in the form of GBS - comes in the form of multi-year country support programs set out in country strategy papers, with budgets attached to them in National Indicative Programs.

The UNIFEM study noted that **all EC country strategy papers list gender among several cross-cutting issues. Some include gender in their description of particular sectors. However, there is little evidence of how gender would be addressed beyond general statements about this being a cross-cutting issue. Few funds are set aside specifically for gender; where such funds exist, they are small compared to the overall size of donor assistance.**

The study notes also that national development plans considering gender issues provide a good basis for national budgets and aid – including GBS - to be gender-sensitive. Having gender in the plans facilitates change on the ground, but does not ensure it. Engendering national development plans is a first step in the engendering GBS process – in the GRB process. However, as the study also points out, **national development plans are not detailed enough to ensure that gender issues are addressed. They can, at best, describe gender-related problems in broad terms and give broad indications of what will be done. WIDE agrees with the UNIFEM study that the difference between effective and ineffective action is determined at a more detailed level relating to operations and activities – in implementation and monitoring. WIDE underscores the need for gender responsive**

budgeting processes to be integrated into GBS processes from the beginning - including in these, initial, priority-setting steps.

Budgeting systems and processes

Budgeting systems are one of the key ways in which national development plans, including their gender commitments, can be monitored. As mentioned above, revisions in budgeting systems often come hand in hand with GBS – not least because donors wish to use budgets as a way of overseeing how GBS is used. **GRB work related to budgeting systems and processes is a key process for engendering GBS.**

Most countries traditionally have a split between recurrent budget, which covers ongoing expenses incurred during a single year, and development or investment budgets which are meant to cover longer-term expenses. EU partner countries have been introducing budget reforms, by introducing **Medium Term Expenditure Frameworks** – MTEFs. MTEFs are supposed to merge the two sides of the budget. And, they are intended to provide three to five year budget forecasts, facilitating understanding of planned future actions.

MTEF reforms are usually accompanied by moves toward programme- or performance-based budgeting. The intention of programme budgeting is to move toward a sectoral description of what government does, rather than bookkeeping line items. Performance-oriented budgeting aims to focus on what is achieved with budget allocations rather than simply accounting for money spent in financial terms. With these reforms, budget documents change to include items such as mission, vision, objectives, reviews of past performance and targets and indicators.

As the study points out, MTEF reforms can aid GRB work. Because they merge budget processes into one. Because they provide an indication of future commitments. And because they include targets and indicators, which can /should be engendered. However, as the study also points out, in most countries, there is a discrepancy between the performance budget indicators and those used in the planning documents, complicating GRB work. Moreover, the introduction of MTEFs is coming about slowly, meaning GRB has to take the practicalities and politics of ongoing dual budgeting systems into account.

The study also underscore's WIDE's stance that budgeting, as determination of national development plans, is a political process There are differences in the degree of consultation over the budget with different players. **Donors are not usually involved in the main budget process**, though they are involved in a range of structures and processes most of which have some sort of link to the budget. **In most cases, civil society consultations happen at a late stage where it is unlikely to result in significant changes.**

Tracking / monitoring performance

The UNIFEM study notes that donor agencies generally do not do any ongoing tracking of the effects of aid.⁷ Even where they exist, there is no guarantee that sophisticated tracking tools will track gender-equity concerns. GRB activities need to be applied here, as well.

The UNIFEM study also notes the potentially large number of different (types of) indicators that could be generated in one country context. It highlights the fact that **long lists of indicators can result in**

marginalization of gender issues, as practitioners tend to treat them as “wish lists”, and tend to treat gender ones as optional. WIDE notes that gender responsive budgeting could provide input into “rationalizing” indicators, and ensuring they are gendered.

Broader development aid structures and processes

The UNIFEM study notes that, in many countries, there is an overwhelming number of coordination, theme groups, working groups that monitor and review processes alongside the standard processes associated with developing, implementing, monitoring and evaluating government budgets. Some of these processes involve only donors, some also government, and some civil society as well. Even if they are invited, the plethora of reviews and processes makes it difficult for CSOs to participate fully and actively. There is inadequate information sharing and coordination across the different structures and processes. Gender tends to be one of the many issues covered by separate groups, which sometimes try to bring it into the others. WIDE suggests that following a coherent gender responsive budgeting strategy as outlined above could assist gender advocates in being strategic about their inputs into these processes.

Using GRB to expand perceptions of “the economy”

Finally, the UNIFEM study noted that a long-term goal for GRB includes fostering a shift in broader understanding of what constitutes “the economy”. As they currently stand, budgets - like broader economic policies which they serve - fail to address the gendered differences in the economy, in particular women’s unpaid work and its link to public finance.

Previous WIDE work – including its 2009 annual conference “We care! Feminists highlight care work in the context of the global systemic crisis” – has highlighted the urgency of expanding the notion of “the economy” to include unpaid work. This is particularly important in the context of the current economic crisis, in which care work for the great majority is becoming increasingly “privatized”, as governments cut budgets – e.g. for crèches, but also for health care - in response to pressures to cut spending. That is: Even more of the care work is being provided by private actors – mostly women – instead of by states. As care work disappears from government budgets, it risks also further “disappearing” from considerations of what constitutes the economy. As the UNIFEM study also points out: Gender equality measures incorporated into national development plans and budgets will fall short, if they do not account for women’s unpaid work.

In focusing also on integrating unpaid care work into national development plans and budgets, GRB enhances the chances of long-term gender equity changes, while promoting women’s political participation in decision-making along the way.

2009 Issues Paper: Towards an EU Action Plan on Gender Equality and Women’s Empowerment in External Relations (Gender Action Plan – GAP)

, The Gender Action Plan on Gender Equality and Women’s Empowerment in External Relations (GAP) is envisioned as the main instrument for implementing the EU *Communication* commitments to gender equity and women’s empowerment in development cooperation, within the context of the new aid

modalities. **In its first draft form** two years ago – it has been revised since, but it has not yet been made available for CSO input - **the GAP does not directly address the need for engendering GBS per se.** However, it contains a reminder that the Council calls the EC and MS to support partner countries in the process of targeting interventions and resources allocations to gender equality and women’s empowerment in sector policies and programs as well as national poverty reduction and growth strategies, medium-term expenditure frameworks (MTEF) and national budgets, and to this effect also promote gender responsive public financial management (PRM) systems and performance assessment frameworks (PAF). **In other words, it essentially argues for the use of GRB as a means to engender EU development assistance, including / especially through the new aid modalities.**

The initial draft GAP noted that there is a “practical consensus” between EC and MS on the relevance of GRB at every level of work with partner countries: ranging from preparation of Country Strategic Papers (CSP), poverty reduction programmes, to the assessment of partner governments’ planning and financing and to the elaboration of targeted projects. And, GRB is already used in some cases by the EC and many MS in their development policies and programming. **Beyond this, the initial draft GAP did not contain specific recommendations as to the steps the EC and MS must take, and the division of labour between them, to ensure that they support GRB processes in all partner countries as a means to engender GBS.**

Conclusions⁸

Potentialities

The new aid architecture may present opportunities for ensuring equality of opportunity, equity of results and benefits between women and men. Particularly if GRB processes are followed in its implementation, GBS need not entail the “disappearance” of gender from the development assistance agenda. GRB processes can help:

- Shape country development priorities,
- Advocate for shifts in public expenditure to match gender policy commitments,
- Enhance policy effectiveness and cost-efficiency
- Build bridges between “gender” and “macroeconomic” actors
- Enable women and other poor citizens to exercise their human rights, thus enhancing participation and social control over budget processes, as well as government transparency and accountability to citizens
- Enhance women’s empowerment through qualified participation in macroeconomic policy debates
- Ensure that development cooperation that is increasingly flowing into partner countries as GBS responds to gender inequalities in society.

Challenges

However, a number of challenges remain to “mainstreaming”, institutionalizing, GRB in GBS processes, including:

- Bureaucratic resistance to NGO work,
- Continued marginalization of gender equality issues leading to limited resources / aid funding being allocated for their implementation,
- Donor, government and NGO capacity limitations in terms of GRB know-how and funding

- The role of national machineries is challenging, as there is a disconnect in most cases between the aid financing agenda, including GBS and budgeting processes on the one hand, and gender equality policies and outcomes on the other,
- Lack of sex-disaggregated and gender-related data and information,
- Lack of comprehensive, systematic, and participatory – but also streamlined - quantitative and qualitative monitoring systems, performance measures and indicators,
- Narrow definition of the economy that overlooks unpaid work.

Recommendations for Action⁹

If integrated into general budget support processes, gender responsive budgeting processes could go a long way toward ensuring that general budget support fosters, rather than disappears, gender equity concerns. This requires action at both donor and partner country “levels”.

EU donors and gender agendas

- CSOs should pressure EU donors to balance the provision of aid. To ensure widespread ownership, GBS support strengthening central governments should be matched by equal strengthening of CSOs and parliaments etc.
- Women’s organizations should pressure EU donors to “harmonize” their approach to GBS with their good track record in supporting gender responsive budgeting initiatives. EU donors should do this by integrating comprehensive gender responsive budgeting processes into their GBS guidelines.
- Such guidelines could be developed as part of / included in the GAP. The experiences of the five UNIFEM-selected countries currently receiving technical assistance to enhance their gender responsive budgeting processes within the context of GBS could be useful best practices guidelines. The GAP could also usefully contain recommendations as to division of labour between EC and MS in ensuring that GRB is integrated into all GBS.
- Call for rapid finalization and implementation of the GAP, ensuring however structured participation of all relevant stakeholders – including the input of CSOs - in the process.

Country development priorities

- Create space in policy dialogue about the use and allocation of GBS, including by creating a forum for dialogue and co-ordination on gender equality; make links across sectors and between thematic groups, including groups on gender equality.
- Encourage the use of staff incentives, and accountability mechanisms for assessing if donors raise gender equality and women’s empowerment in policy dialogue about use of GBS.
- Ensure that aid channeled through GBS is assessed against poverty reduction strategies - which means, first, ensuring that partner country poverty reduction strategies are engendered.
- Include gender equality and women’s empowerment explicitly in the memorandum of understanding between budget support partners.
- Include gender equality in performance assessment framework (PAF) priorities, and use gender sensitive indicators and data in joint reviews.
- Based on case studies, gender advocates could (continue to) provide evidence re: the gendered division of unpaid labor, its relation to the monetary economy, and the implications of plans and budgets for it. The aim is to eventually garner acceptance for a broader definition of “the economy”, and for plans and budgets to reflect it.

- Long-term, work to ensure government as well as donor support for integration of GRB processes into all GBS processes.

Budgeting systems and processes, and monitoring

- Support the introduction of Medium Term Expenditure Frameworks (MTEFs), acting to “engender” the indicators.
- Build capacity of donor agency staff, local government, parliamentarians and civil society groups to understand how public financial management systems work, to address budgetary issues and to monitor resource allocations from a gender equality perspective.
- Build capacity for gender responsive budgeting within, rather than separate from, public financial management system reforms and capacity development programs. That is: Ensure that capacity for gender responsive budgeting is developed as part of mainstream public financial management and public sector reforms, and becomes part of the skill set of the main players, rather than resting in a separate division and with different officials. Donors and partners can work together to jointly develop the capacity of both gender equality specialists and macro-economists involved in public financial management so that each more fully understands the other’s point of view.
- Gender advocates should collaborate whenever possible with other CSOs attempting to provide input into budgeting processes.

Tracking / monitoring performance

- Gender advocates should lobby for GRB to be applied to tracking tools, where they exist.
- Gender advocates could provide strategic inputs as to how discrepancies between performance budget indicators, and planning documents indicators, could be streamlined – facilitating donors’ work more easily, as well as gender monitoring more specifically.

Broader development aid structures and processes

- Gender advocates could follow a gender responsive budget “program”, such as the one outlined by One World Action, so as to provide strategic – proactive as well as reactive – input into this plethora of processes.

Expanding perceptions of “the economy”

- Gender advocates could intensify their efforts to “kick start” discussions about the necessity of integrating analysis of unpaid work into broadly held visions of “the economy”, particularly in light of the kinds of changes underway as a result of the economic/systemic crisis. They could sponsor high profile case studies that demonstrate how much care work is being undertaken by women and changes taking place as a result of government budget cuts, and propose what development plans and budgets should look like if they incorporated this work in their models.

References / Further reading

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Endnotes

1 Though it is unlikely to reach this stated target. (Ecdpm / action aid (year) Wither EC Aid? Briefing Note: Budget support.

2 Ecdpm / action aid: 2.

3 UNIFEM 2009: 7.

4 Available online at
(http://www.oneworldaction.org/Resources/One%20World%20Action/Documents/Gender%20and%20Aid/JUST_BUDGETS_GUIDANCE_NOTES_FINAL_V4.pdf).

5 P.8

6 Division for the Advancement of Women: Financing for gender equality and the empowerment of women, Oslo September 2007.

7 DFID is an exception as far as EU MS donors go. And the EC, in Ethiopia.

8 This section is based primarily on One World Action and WIDE documents.

9 This section is based partly on DAC Briefing papers proposals, partly on WIDE strategic thinking.