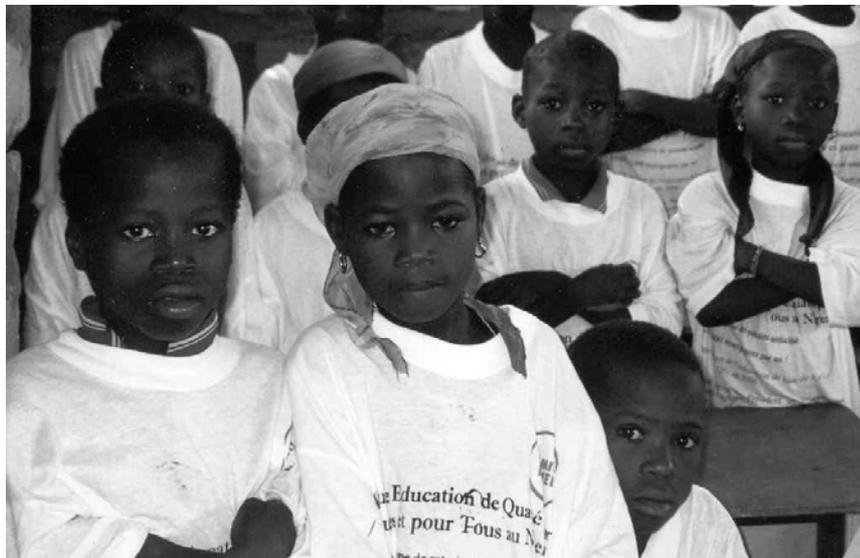


## 7. Gender-Responsive Budgeting in Education



*Schoolchildren demonstrating support for quality education, Tillaberi, Niger*

**In the mid-1980s, the Australian government embarked on the first initiative to analyse government budgets from a gender perspective. In 1995, South Africa and the Philippines became the second and third countries to attempt gender-responsive budget exercises. By 2003, there had been similar initiatives in more than sixty countries, spanning every continent. This paper uses the gender-responsive budgeting approach to explain how governments and donors can promote gender equality in education through their decisions on financing.**

## What is gender-responsive budgeting?

Gender-responsive budgeting (GRB) initiatives are very diverse, but they all have in common one essential question: *What is the impact of the government budget, and the policies and programmes that it funds, on women and men, girls and boys?* GRB is thus an attempt to ensure that gender-related issues are considered and addressed in all government policies and programmes, and specifically in the budgets allocated to implement them.

By 2003, GRB initiatives had been undertaken in more than sixty countries, spanning all the continents.<sup>1</sup> They differ significantly from one another, for a range of reasons that include the political and social conditions prevailing in the different countries, and the nature of the actors undertaking the activities. The availability of the budget and other supporting information for public scrutiny and the nature of the budget format will also lead to different approaches.

Some GRB initiatives have been undertaken by governments, some by parliamentarians, and some by civil-society groupings. Where parliaments undertake the exercise, it is part of their role of overseeing a government's budget. Where civil society plays a role, it is usually linked to advocacy for reform. However, groups from government and civil society may work together, with overlapping aims.

GRB initiatives are known to have been undertaken in connection with education in the following countries: Kenya, Malawi, Mauritius, Mozambique, Namibia, Rwanda, South Africa, Tanzania, Uganda, Zimbabwe, Barbados, Bangladesh, Malaysia, Nepal, Pakistan, the Philippines, and Sri Lanka.

### Some examples of gender-responsive budget initiatives

In **South Africa**, the Women's Budget Initiative was the result of action by parliamentarians in the Joint Monitoring Committee on Improvement of the Quality of Life and Status of Women in the first post-apartheid national legislature in 1994. Research and analysis for the Initiative was carried out by two non-government organisations (NGOs). The parliamentarians had a high level of legitimacy and were well placed to take forward the findings of the GRB initiative.

In **Tanzania**, a gender-focused NGO first undertook a GRB research and advocacy exercise in 1997. The government, prompted by donors, subsequently embarked on its own GRB exercise. In 1999, the government contracted the NGO to provide advice and training on GRB.

In **Rwanda** in 2002, the Ministry of Gender and Women in Development, supported by the UK government's Department for International Development, worked together with the Ministry of Finance in leading the GRB.<sup>2</sup>

<sup>1</sup> **7. Gender-Responsive Budgeting in Education**, Education and Gender Equality Series, Programme Insights, Oxfam GB. December 2005

## What can GRB tell us?

Most GRB initiatives involve a process of analysis of some sort, although the processes will be different in different contexts. Internal government initiatives require that civil servants analyse the budget in gender terms before they decide how to change it. In parliamentary initiatives and those taking place outside government, the budget is analysed to understand what it means in terms of gender equality.

The South Australian GRB used a simple framework which has since been adopted and adapted in many other countries. This framework distinguishes between three categories of expenditure, as follows:

- **Gender-targeted expenditures**, i.e. expenditure directed specifically at improving gender equality. In terms of education, one example would be special scholarships for girls.
- **Staff-related employment-equity expenditures**, i.e. expenditures that promote employment equity among public servants. In education, they might include expenditures on training for women teachers to help them to progress further in their careers.
- **Mainstream/general expenditures**, analysed for their gendered impact; for example, expenditure on post-compulsory education, sectors which commonly have a high proportion of male students; and the provision of early childhood education, because it particularly benefits women and older girls by reducing their burden of child care.

This paper uses these three categories to discuss how education budgets in different countries have tried to promote gender equality.

## Gender-targeted expenditures

Gender-targeted expenditures are the most easily visible in a government's budget. GRB initiatives should, however, avoid focusing only on this first category, because it usually accounts for only a tiny fraction of public expenditure. There is a risk that disproportionate attention will be focused on these small expenditures, while other programmes and associated budgets continue to operate with little or no consideration of gender equality. It is nevertheless important to consider this category of expenditures, because it constitutes a form of 'affirmative action' – the visible extra push that can start dislodging long-standing inequalities.<sup>3</sup>

The school stipends paid to girls in Bangladesh are among the best-known of targeted gender expenditures within the education sector. A recent evaluation<sup>4</sup> of the stipends acknowledges that the enrolment of girls has improved significantly since they were introduced.

Adolescent girls are now a visible in large numbers, going to and from school in rural areas – in itself a fundamental change.

However, the study argues that the introduction of free tuition may play an equal (or even stronger) role in increased enrolment than stipends do. Because the two initiatives were introduced more or less simultaneously, it is difficult to distinguish their impacts. The stipends are expensive: in 1998/99 those at secondary level accounted for 14.5 per cent of the total budget for secondary education, and for 6 per cent of the total education budget. The Female Stipend Program, then, is one of many initiatives in Bangladesh, but it is credited with also having had a positive impact on the enrolment of girls in primary school.<sup>5</sup>

The stipends have prompted concerns about corruption. A household survey conducted by Transparency International Bangladesh in 2005 found that, in the case of girl students at the secondary level, 22 per cent of those entitled to receive the stipend had to pay the government an average of 45 Taka in order to enroll in the scheme. In addition, 5 per cent of primary-school students and 38 per cent of female secondary-school students stated that at the time of payment a portion of their stipend was deducted by the authority.<sup>6</sup> These concerns raise awareness of the need for greater transparency in the administration of the stipends.

There are also questions to be asked about the equity of some of the gender-targeted expenditures once one looks beyond gender to other dimensions such as social class. In Rwanda, for example, schools for girls from disadvantaged families were established by the Forum for African Women Educationalists (FAWE); but some observers alleged that places in these schools were allocated to girls from richer families. In Zambia, UNICEF's Programme for the Advancement of Girls in Education (PAGE) is perceived to have created schools which are high quality but unrepresentative of and isolated from mainstream schools. These examples demonstrate that allocating specific expenditure to girls' education does not necessarily or adequately address the issue of girls' disadvantage due to poverty.

Bursary schemes are a common form of targeted gender expenditure. These schemes are usually small and thus benefit a limited number of children. There is a danger that the 'mainstream' bursary and loan schemes aimed at all children pay no attention to gender balance, on the grounds that the girls' needs are met by the targeted schemes. A more promising approach in countries that operate significant 'mainstream' schemes might be to incorporate quotas or affirmative action of some other kind into the general allocations. In 2005 this approach was being considered in Rwanda.

Targeted expenditures have often been funded by donors rather than by government; but they must address the vital question of sustainability: what will happen when donor funding for such

expenditures ends, and what indicators will be used to decide when the affirmative action is no longer needed?

## Staff-related expenditures

Staff-related expenditures are important because a large proportion of most government budgets in education and other social sectors is spent on salaries and related costs. It is therefore necessary to analyse the total sum spent on salaries, and the proportions spent on the salaries of men and women.

Free education, while not a guarantee of gender equality in education, can bring significant benefits for girls. But free education costs a lot of money. Like any scheme to expand education provision, it requires that many more teachers are employed, and at good levels of pay if quality is to be maintained. This may leave little public money to pay for other items, such as textbooks. Some sources (including the World Bank) have suggested that one solution to this problem is to employ teachers who are less well qualified, at lower rates of pay. In many contexts such teachers are women. This solution is, however, clearly self-defeating. It is 'economic' in narrow terms; but it is not effective, because it will not provide children with a good education. In addition, low salaries will encourage teachers to engage in secondary occupations, or attend workshops rather than teach, in order to benefit from the attendance allowances, which results in neglect of their teaching duties.

A low-salary solution to budget problems usually disadvantages women disproportionately. This happens because the lowest salaries are usually found at the primary level, where women teachers predominate. Science and maths teachers often receive higher salaries in order to fill posts in shortage subjects, and these are areas in which fewer women teachers are found.

### **Analysing the equity of education expenditure Tanzania**

Research by the Tanzania Gender Networking Programme (TGNP) in the mid-1990s found that 94 per cent of government employees, many of whom were teachers, were earning less than 65,000 Tanzanian Shillings (US\$105) a month. TGNP contrasted these low salaries with large expenses benefiting people at the top of the hierarchy. For example, 35.7 million Tanzanian Shillings was allocated by the Administration and Personnel Department for 'special expenses' for the Minister, Deputy Minister, and Principal Secretary. The special expenses included the purchase of furniture and household items for the officers concerned. TGNP pointed out that the money could have been used instead to provide for an additional 30 female students at university, or scholarships for 500 female students at secondary school, or primary education for at least 1600 students.<sup>7</sup>

## General/mainstream expenditures

The introduction of universal and free primary education (UFPE)<sup>8</sup> into a country is probably the most dramatically obvious application of mainstream expenditure that is likely to contribute to gender equity.

Some people argue that UFPE is not the answer to gender disparities in education, because such disparities usually remain after fees are abolished. This argument is flawed. Firstly, if the level of enrolment significantly increases for both boys and girls after UFPE is introduced, as it invariably does, this represents progress for girls, even if the gender disparities remain the same. If, as often happens, the gender gap narrows, it represents even more of an advance. In Uganda, Universal Primary Education, introduced in 1997, increased the primary net intake rate from 33 per cent for boys and 31.7 per cent for girls in 1991-1995 to 93 per cent for boys and 90 per cent for girls in 1997. This is clear evidence of progress.

A significant increase in girls' enrolment was ensured in Uganda by the fact that government provided free education for four children per family, on condition that at least two of these should be girls if there were girls in the family. But even without this ruling, UFPE is likely to promote girls' enrolment, in that previously, when fees were charged, families would often choose to educate sons rather than daughters. The reasoning being that boys are considered more likely to stay in the family and support it later in their lives, while most girls would marry into other families. Once the cost of schooling is removed (or at least reduced), this boy-friendly bias in incentives for the family becomes less compelling.

Focusing on mainstream expenditure rather than special gender-related expenditures does not inevitably mean a lack of targeting. There is a range of ways in which targeting can occur within mainstream expenditure, without making separate allocations. One such means of targeting involves redistributing funds across education levels.

In a small number of countries, women outnumber men at all educational levels, including tertiary. But in most low-income countries, very few women usually reach tertiary studies - yet spending per higher-education student may be vastly greater than that on the average primary student. This is inequitable in terms of social class, because many poor children do not complete primary schooling; and it is inequitable in terms of gender, given the small number of women who benefit from the high tertiary expenditures. Shifting money to reduce the inequality in spending between tertiary and primary or secondary education will usually favour girls. In 1995/96, the Tanzanian government was spending more than 100 times as much on a single tertiary student than on a primary-school

pupil, and the cost of educating a university student was 17 times that of educating a secondary-school student.

Countries spend significant proportions of their education budgets on primary, secondary, and tertiary education. Generally the debate focuses on the relative proportions allocated to these three levels. What is often neglected is two other levels: adult education and literacy, and early childhood education and development (ECED). The provision of adult education and literacy for women contributes to broad social-development aspirations to achieve an end to poverty. ECED is important for women because it helps to lessen their burden of unpaid labour in terms of child care, and also frees them to engage in income-earning activities or social activities outside the home.

#### **Neglecting early childhood education at the expense of women**

In the mid-1990s, South Africa was spending less than 1 per cent of its education budget on literacy, despite the fact that 23 per cent of South African women aged 20 years and above had never attended school. It was also spending less than 1 per cent of its education budget on ECED. This situation still prevails a decade later. Only 0.7 per cent of consolidated provincial education budgets for 2005/6 is devoted to ECED.<sup>9</sup>

The government did pilot the use of conditional grants (i.e. funds that could be spent only on ECED) to provinces, but the grants were under-spent and have now ceased. Upon this cessation, it was expected that provinces would contribute to ECED themselves, but this has not happened. Failures of both these strategies for funding arguably demonstrate a lack of leadership within the national Department for Education, which has failed to encourage provincial departments to spend some of their budget on ECED, and a lack of awareness of the issue of unpaid childcare work that is done mainly by women.<sup>10</sup>

A further form of targeting within mainstream expenditures focuses on gender or girls at the same time as attempting to address other forms of marginalisation. This is important because, while policies such as UFE generally succeed in improving gender parity, problems in respect of enrolment often remain for the poor, for scheduled castes and tribes, and for migrant families and children living in remote rural areas. Initiatives introduced to address these sometimes ignore gender issues.

India's National Programme for Education of Girls at Elementary Level (NPEGEL) is an interesting attempt to address gender-based marginalisation and other aspects of disadvantage simultaneously, but without direct targeting.

### Addressing gender and marginalisation in India

The National Programme for Education of Girls at Elementary Level (NPEGEL) is a supplement to the Indian government's mainstream Sarva Shiksha Abhiyan (SSA) programme, introduced in 2001/2. SSA already supports some financial provisions for girls' education, including free textbooks. NPEGEL will focus on 'underprivileged/disadvantaged girls' in classes I–VII in (a) areas where the level of rural female literacy is less than the national average and the gender gap is above the national average; (b) districts where scheduled castes/tribes constitute at least 5 per cent of the population, and the female literacy rate is below 10 per cent; and (c) selected urban slums. 'Clusters' of schools which demonstrate good rates of enrolment for girls will receive extra money to allow them to provide things such as additional classrooms, clean drinking water, electrification, and toilets. NPEGEL will also provide money for child-care centres, to relieve older girls of this task.<sup>11</sup>

Other relatively low-cost strategies involve a 'reward' for institutions or local governments that perform well in respect of gender equality. The rewards could, for example, be built into resource-allocation formulas for local governments, as described above for NPEGEL.

There is also, however, a range of ways in which a focus on girls can be achieved within existing budgets. Examples include the following:

- Introducing a quota system for the selection of girls for the first year of secondary school or for university. (However, when quotas are introduced care must be taken to provide the necessary support to help girls succeed.)
- Requiring fewer 'points' from girls to qualify for admission to secondary or tertiary education. (This is done in respect of *men* in Kuwait.)
- Requiring that all community-built secondary day schools enrol and retain equal numbers of girls and boys.
- Requiring, as Uganda did, that where only a certain number of children per family can be provided with free education, at least half of these must be girls.

## Recommendations

### For governments:

- Support free education programmes, because they encourage improvements in girls' access to and retention in schools. The cost of implementing them effectively must, however, be acknowledged and planned for.
- Wherever possible, support gender equality in education through the mainstreaming of gender equality within other programmes. Adequate monitoring and evaluation mechanisms should be

developed, to assess whether gender equality is being successfully mainstreamed.

- Determine before supporting donor-funded gender-specific initiatives that the expenditure will be sustainable if, and when, donor support ends; discuss and agree on the indicators and process for ending special programmes.
- In the interests of both reducing poverty and achieving gender equality, carefully consider the balance of expenditure between tertiary, secondary, and primary education; and consider a range of sources for funding the tertiary sector, including low-interest student loans, to be repaid over a period after graduation.
- Ensure that a concern to advance girls' education does not obscure the need for support in neglected areas such as women's literacy, early childhood development, and gender-balanced vocational education.

#### **For NGOs**

- Explore opportunities for work and/or campaigning with parliamentarians, based on a gender-budgeting exercise for education.
- Work with employees in the education sector to examine gender equity in terms of who is employed where, on what terms, and with what consequences.
- Support and encourage local organisations and schools to engage in their own GRB exercises.
- When planning campaigns for universal free education, examine the distribution of expenditure in the education sector as a whole, and ask who benefits.
- Link campaigns for universal and free primary education with wider initiatives to promote early childhood education and development, and adult education.

## Notes

<sup>1</sup> D. Budlender and G. Hewitt (eds.) (2002) *Gender Budgets Make More Cents*, London: Commonwealth Secretariat.

<sup>2</sup> D. Budlender (2005) 'Girls' Education Paper – The Financing Issues', background paper for *Girls' Education: Towards a Better Future For All*, London: DFID.

<sup>3</sup> See also Paper 8 in this series: 'Girls' Education in Africa', Education and Gender Equality Series, Programme Insights, (Oxfam GB, 2005), for discussion of a twin-track approach focusing on (a) gender interventions and girls-only initiatives, and (b) improving access and quality for all children.

<sup>4</sup> J. Raynor and R.A. Chowdhury (2004) 'A National Assessment of Girls' Secondary Stipend Programmes in Bangladesh'. Draft paper for DfID, Dhaka, Bangladesh.

<sup>5</sup> J. Raynor. (2005) 'Educating girls in Bangladesh: Watering a Neighbour's Tree? In S. Aikman and E. Unterhalter, Eds. *Beyond Access: Transforming Policy and Practice for Gender Equality in Education*. Oxford: Oxfam GB

<sup>6</sup> Transparency International Bangladesh (2005) *Corruption in Bangladesh: A Household Survey*. Available online at [www.ti-bangladesh.org/documents/HouseholdSurvey200405-sum1.pdf](http://www.ti-bangladesh.org/documents/HouseholdSurvey200405-sum1.pdf)

<sup>7</sup> Budlender 2005, op. cit.

<sup>8</sup> Different terms with different implications are adopted in different countries; for example, Kenya has introduced Free Primary Education (FPE), while Uganda and Tanzania have introduced Universal Primary Education (UPE).

<sup>9</sup> R. A. Wildeman (2005) *A Review of National and Provincial Education Budgets*. Occasional paper, Cape Town: Institute for Democracy in South Africa.

<sup>10</sup> Budlender 2005 op. cit.

<sup>11</sup> Ibid.

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