

**OXFAM**  
RESEARCH BACKGROUNDER

# **GENDER- RESPONSIVE BUDGETING IN TANZANIA**

Bertha O. Koda and Lilian V. Mtasingwa



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# ACRONYMS AND ABBREVIATIONS

ANSAF	Agricultural Non-State Actors Forum
BPfA	Beijing Platform for Action
CCM	Chama cha Mapinduzi
CEDAW	Convention on the Elimination of All Forms of Discrimination against Women
CSO	civil society organization
DCF	Development Cooperation Framework Fem-Act Feminism Activism Coalition
FGD	focus group discussion
GAD	gender and development
GB	gender budgeting
GBI	Gender Budgeting Initiative
GoT	Government of Tanzania
GRB	gender-responsive budgeting
KII	key informant interview
LGA	local government authority
LGU	local government unit
MDAs	ministries, independent departments, and agencies
MDG	Millennium Development Goal
MoFP	Ministry of Finance and Planning
MoHCDGEC	Ministry of Health, Community Development, Gender, Elderly and Children
MVIWATA	Mtandao wa Vikundi vya Wakulima Tanzania

NACSAP	National Anti-Corruption Strategy and Action Plan
NGO	nongovernmental organization
NSGRP	National Strategy for Growth and Reduction of Poverty
PWDs	people with disabilities
RS	regional secretariat
RUDESO	Relief to Development Society
RUDI	Rural Urban Development Initiative
SADC	Southern African Development Community
SDG	Sustainable Development Goal
TASAF	Tanzania Social Action Fund
TGNP	Tanzania Gender Networking Programme
URT	United Republic of Tanzania
WDC	ward development committee
WID	women in development

# EXECUTIVE SUMMARY

This research report is a situational analysis of gender-responsive budgeting (GRB) in Tanzania conducted between March and June 2020. The main objective was to map the current budgeting process and outcomes in Tanzania and critically examine how the findings could be aligned with the work of Oxfam's approach toward promotion of gender equality in the agriculture sector and beyond. Data sources include desk reviews as well as field work involving key informant interviews (KIIs), focus group discussions (FGDs), participatory theory of change and learning sessions, and office visits to collect both primary and secondary data. Respondents included staff from Oxfam and partner organizations working on gender, fiscal justice, GRB, or public financial management issues; donors; academic institutions; rural female leaders and female food heroes; local leaders from the Kishapu, Kahama, and Hanang District Councils; officials from the Ministry of Agriculture and Livestock Development and the Ministry of Finance and Planning (MoFP); and civil society organizations whose interests relate to the research objectives.

The report includes background information on gender budget processes at international, regional, and national levels, highlighting the paradigm shift from a focus on women in development to one on gender and development. The need for a clear budget that directs governments to allocate public resources to achieve gender equity, sustainable development, and women's development is also emphasized. Furthermore, the report highlights the need for participatory planning and budgeting, so that decisions are made by all citizens and smooth revenue collection and expenditure are guaranteed. This will challenge the myth that budgeting is too technical for ordinary people to participate in. Respondents in the study noted that GRB is a process that includes policy formulation, needs assessment, policy review, resource allocation, implementation, impact assessment, and monitoring and evaluation.

Findings show that public budget processes are evident at both the local and central government levels. The Constitution of the United Republic of Tanzania and several other laws enforce the use of GRB to promote gender-balanced and integrated national economic plans. The MoFP develops guidelines for preparing plans and budgets that will support the achievement of Vision 2025, national five-year plans, and equitable and sustainable development.

It is at the village level where community budget needs are identified, though women's needs are often marginalized. Although women are best at articulating their needs, their voices are seldom raised owing to limited representation. The grassroots-level village councils discuss prioritized needs, but women are

underrepresented at this level in terms of both the number of representatives and the prioritized needs. In the ward development committees, the needs of female farmers, whether they operate on a large or small scale, are further marginalized. The characteristics, needs, challenges, and scope of large-, medium-, and small-scale women farmers are diverse, with diverse consequences for the budgeting process. Yet government budgets typically sideline the needs of female farmers—particularly small-scale female farmers who produce subsistence crops—for access to land, markets, credit, and extension services, especially compared with male farmers.

Respondents noted the diversity of male and female farmers' needs, which should be incorporated into budgets according to the different categories of farmers. The respondents' view is that plans and budgets designed to address general farmers' needs, such as markets and loans for inputs and storage for surplus harvests, are directed primarily to farmers who grow strategic crops, who are mainly men. Tanzania provides for a separate budget facility for women and youth, and although most respondents from the grassroots and the government consider this as evidence of a gender budget, it reflects a limited knowledge of GRB. Some projects supported by nongovernmental organizations (NGOs) and civil society organizations (CSOs) reflect women's and men's diverse needs, a feature that government budgeting should emulate.

Despite limited knowledge of GRB among communities and government staff, the Tanzanian government has both formal and informal systems and structures for effective GRB. Nonetheless, there is a need to build capacity among staff and communities and to empower women, particularly small-scale farmers, for effective planning and budgeting. The staff of local and national NGOs and CSOs have more knowledge and analytical skills on gender and GRB, including best practices on GRB processes. NGOs have helped build capacity on gender awareness and GRB interventions among other stakeholders through joint projects on food security, climate change, gender equality, and other areas of focus.

The report sums up the discussion on GRB in Tanzania by appraising the available user-friendly and democratic systems, which have yet to be fully utilized. Communities need to be empowered to challenge constraints to their participation in decision making on budgets related to their priority needs. Citizens must be involved in all phases of the budget process and cycle. Government officials and institutions must be provided with adequate GRB knowledge and skills so they can use available democratic systems and structures to empower communities to engage in GRB.

# 1. INTRODUCTION AND BACKGROUND

## TANZANIA'S SOCIOECONOMIC AND POLITICAL PROFILE

The United Republic of Tanzania (URT), located in East Africa, is made up of mainland Tanzania and Zanzibar. It is a multiethnic country of about 50 million people from more than 120 tribes that have been unified through the use of one national language, Kiswahili. Tanzania has an area of about 945,000 km<sup>2</sup> (mainland) and 1,658 km<sup>2</sup> (Zanzibar). Agriculture is the main economic activity. The country has extensive arable land, which allows the cultivation of various food and cash crops.

Tanzania recognizes that gender equality will enable full participation of both men and women in the country's development process, leading to sustainable and equitable development. This is expressed in the United Republic of Tanzania Constitution (1977), the Tanzania Development Vision 2025, the National Strategy for Growth and Reduction of Poverty (NSGRP I-2005 and II-2010), the National Women Development and Gender Policy (2000), the National Strategy for Gender Development (NSGD 2005), and various other international and regional policy documents. The Tanzanian agricultural sector, however, still suffers from gender bias, and females and males do not have equal access to opportunities. Women account for more than 90 percent of the agricultural labor force in Tanzania, producing about 70 percent of the country's food requirements, but they benefit less than men from the sector (URT 2013; Jeckoniah *et al.* 2013). Women are constrained by a number of challenges, including cultural norms, beliefs, and practices that hamper their ability to acquire skills and knowledge, reduce their access to productive resources, and impede their participation in rural development institutions, opportunities, and decision making (URT 2013).

## DEVELOPMENT PARADIGM SHIFT

Since the 1980s the development paradigm has shifted from focusing on women in development, where attention was on women's concerns, to gender and development, where men's and women's concerns are placed at the center of

the agenda for sustainable human development. This shift was influenced by persistent gender inequality, which was found to constrain macroeconomic policy outcomes. A country's budget is a significant aspect of its macroeconomic policy. To achieve its development goals, any country needs a clear budget that specifies key indicators to be adhered to in its planning and development strategies and policy implementation. The budget helps to show how governments allocate public resources with the aim of meeting citizens' socioeconomic, political, and cultural needs. A budget is an important policy implementation tool for validating how governments respond to development challenges (poverty, social exclusion, gender inequalities, and others) in accordance with citizens' priorities, given the resources available. The citizens of any country are highly diverse—they include men and women who play different roles, are located in different areas, and have diverse needs, interests, class, positions, and status—so the budget must cater to such diversity.

## THE NEED FOR PARTICIPATORY PLANNING AND BUDGETING

According to the United Nations, “Participatory planning and budgeting refer to the involvement of citizens in identifying local priorities, policies, programmes, and projects that require allocation of resources, . . . provide the opportunity for people's participation in the allocation of resources to priority social policies, and for them to monitor public spending and policy performance. As such, local constituents gain ownership of the policies/programmes/projects for local development; thus, they are committed to support local government unit (LGU) social policies and development initiatives” (UN, 2005, 4). Planning and budgeting are therefore interrelated processes geared toward the implementation of government policies aimed at addressing people's development challenges. Involving people in planning and budgeting is designed to ensure that people's needs and aspirations are heard and mainstreamed in plans and budgets. Bringing community members into public budgetary decision-making processes is a vital intervention for supporting poverty eradication policies, improving social service delivery, and working toward the attainment of the Sustainable Development Goals (SDGs).

The plans and budgets emanating from such a process are likely to reflect diverse gender needs, while the budget will express how the planned interventions will be paid for. This bottom-up approach to public expenditure management involves a range of methods, tools, and choices for facilitating the involvement of ordinary citizens and their organizations in the allocation, management, and use of funds as well as in auditing the results of the disbursed resources. This approach thus contributes to good governance principles such as transparency, commitment to serving people, efficient provision of services, and

fulfillment of diverse peoples' needs (UN 2005, 5). It has to operate within a specific framework, as shown in Figure 1.

**Figure 1: Framework for Citizen Participation in Subnational Budgeting**



Source: Thindwa (2004), as shown in UN (2005, 5).

Participatory budgeting facilitates smooth revenue collection and expenditure. It empowers citizens to learn about and become involved in the policy-making process and, above all, to challenge the status quo and the patriarchal ideologies, systems, and structures that embrace economic, social, and political exclusion. Furthermore, it demystifies budgeting, challenging the perception that the budget is a technical issue that is beyond the grasp of ordinary citizens. Indeed, the process cements productive tripartite cooperation and collaboration between the government, citizens (including civil society and nongovernmental organizations), and the private sector in pursuit of gender equality and equitable and sustainable development.

Only a few countries have undertaken participatory planning and budgeting, but the experiences of Bangladesh provide several lessons:

- People's participation in local budgeting increases the transparency and accountability of the local government institutions, which become more responsive to people's needs and aspirations.
- It is the local people who best understand a community's development problems, so making development people-oriented means incorporating local people's suggestions.

- A budget prepared and implemented without people's participation cannot necessarily ensure sustainable development.
- Taxes should not be imposed without providing services. Such an approach can create popular discontent with local government authorities (LGAs) and ultimately constrain the pace of development.
- People's participation in local priority setting can facilitate participatory democracy at the grass roots, which can empower people and foster social harmony.
- If motivated properly, local participation can help achieve the targets of the MDGs (currently the SDGs) through the formation of local people's committees and MDG-oriented budgets (UN 2005, 8–9).

Gender budgeting (GB) or gender-responsive budgeting (GRB) means applying a gender lens at all stages of the budget process, from policy formulation, needs assessment, policy review, resource allocation, implementation, and impact assessment to monitoring and evaluation. There is a misconception that gender budgeting refers only to women's budgets; in fact, GB refers to the allocation of budgetary resources with the goal of meeting the needs and interests of both men and women by considering, among other things, their context, class, roles, age, ethnicity, education status, and poverty. The key is to identify their needs so that where their needs diverge, budget allocations diverge as well, and where they are the same, each benefits equally.

Employing gender equality as an aspect of the budgeting process is crucial to achieve significant change in the lives of women, men, boys, and girls, in line with their diverse needs. A budgeting process that ensures gender equality enhances effective targeting of public expenditures that will lead to gender-specific outcomes. A GRB process ensures that the needs and interests of individuals from diverse social groups are well integrated. GRB enhances good governance, ensuring transparency, inclusiveness (participation, equity, and diversity), and accountability.

Ideally, GRB requires the involvement of all social groups, either directly or through representatives. It can give poor and vulnerable groups a voice to call for obtaining a greater share of public resources. It also gives citizens a better opportunity to see for themselves the degree to which policy is translated into outcomes on the ground. A gender-responsive budget is premised on the understanding that citizens have the right to monitor how well promised public services are delivered to them by providers. This kind of citizen engagement also increases transparency and accountability and improves the quality of governance.

In democratic governance, plans and budgets are directed toward the attainment of all-embracing, equitable, and sustainable development. Participatory planning and budgeting processes are not only political or theoretical (i.e., documented and articulated in policies and plans) but also practical (i.e., carried out in practice). Participation occurs through collaboration among key stakeholders—community members, civil society organizations (CSOs), government officials, and development partners—during the budgeting process. These categories of people do not constitute a homogenous group; each may have specific interests to be addressed in the budget. Planning and budgeting processes require effective strategies for soliciting input on critical issues and how to address them, so there are operational needs and basic requirements that must be met. Guthrie (2003, as cited in UN 2005) considers the operational needs of participatory budgeting at three levels: (1) a conducive policy and legal framework; (2) a regulatory operational framework for participation with clear definition of roles and functions, including the methodology of participation; (3) capacity building for civil society, government officials, and the community at large. For governments committed to engaging in participatory planning and budgeting, there are both actual and potential entry points to be used by stakeholders to initiate the process.

## INTERNATIONAL AND REGIONAL COMMITMENTS FOR PROMOTION OF GRB

Globally, GRB initiatives have been pioneered by international gender equality commitments like the Convention on the Elimination of All Forms of Discrimination against Women (UN 1979), Articles 2 and 7. In the 1990s GRB initiatives were advanced by the Beijing Platform for Action (BPfA) on gender equality in development, which initiated gender mainstreaming as an approach to ensure gender equality in all areas of socioeconomic development. Such initiatives were fast-tracked by the United Nations (UN 1995), which urged all governments to make sure public expenditures benefit men and women equally, with the goal of achieving gender equality in all areas. These efforts garnered increased commitment through the United Nations Millennium Development Goals (2000), where goal 3 explicitly called for gender equality and women's empowerment. In 2015, the Sustainable Development Goals (SDGs) succeeded the MDGs; goal 5 recommends adopting and strengthening policies for the promotion of gender equality and empowerment of women and girls.

At the regional level, Article 15 of the 2008 Southern African Development Community (SADC) Protocol on Gender and Development envisages gender-sensitive and gender-responsive budgeting at the micro and macro levels,

including tracking, monitoring, and evaluation (SADC 2008). In addition, SADC developed GRB guidelines to help member states develop finance management practices and national budgets that ensure gender equality priorities and commitments (SADC 2014, 10). The Addis Ababa Declaration (2014) of African ministers responsible for gender and women's affairs recommends that member states adopt gender-sensitive planning and budgeting schemes. Article 2 (10) of the African Charter on Democracy, Elections, and Governance directs governments to "*Promote the establishment of the necessary conditions to foster citizen participation, transparency, access to information, freedom and the press, and accountability in the management of public affairs,*" and Article 2 (11) directs them to "*Promote gender balance and equality in the governance and development processes*" (AU 2007, unpaginated). Article 8 (1) of the same charter directs state parties to eliminate all forms of discrimination while Article 8 (2) recommends adoption of legislative and administrative measures that will guarantee the right of women and other vulnerable social groups. Article 29 requests that state parties take measures to ensure women's representation and participation in decision-making bodies.

In its initiatives to achieve an environment free from gender inequality and promote economic growth, sociocultural reform, and justice, the government of Tanzania has acceded to and ratified the CEDAW, BPfA, MDGs, SDGs, SADC Protocol on Gender and Development, and SADC guidelines. It has also taken extra steps to develop, strengthen, and reform its legal and policy frameworks to promote gender equality in all areas. These initiatives are evident in national policy and legal standards, the Constitution, and other sector-specific policies and laws. The Constitution of the United Republic of Tanzania (URT), for instance, provides for equal participation of women and men in all aspects of governance. In its preamble, the Constitution provides for recognition of gender equality. Article 9 provides for respect of human rights as per the Universal Declaration of Human Rights and requires the government and its institutions to provide equal opportunity for all women and men. Article 21 affirms the right of every Tanzanian citizen to participate in the governance of the country directly or through their elected representative. Moreover, the Constitution, through various amendments, provides for affirmative action to improve women's access to the representative organs of the state, such as Parliament and local councils, to rectify historical gender imbalances. Finally, Article 137 (1) and (2) provides guidelines for the government to authorize its expenses (URT 1977).

Article 8 of the Constitution (URT 1977, 13) defines the principles that govern the relationship between the government and the citizens as follows:

1. sovereignty resides in the people [women and men] and it is from the people that the Government through this Constitution shall derive all its power and authority;

2. the primary objective of the Government shall be the welfare of the people;
3. the Government shall be accountable to the people; and
4. the people [presumably women and men] shall participate in the affairs of their Government in accordance with the provisions of this Constitution.

The intended citizens' participation in governance includes participation in the planning and budgeting processes, where national resources are mobilized and distributed for the welfare of the people. Another key government initiative was the endorsement of the National Strategy for Growth and Reduction of Poverty (NSGRP I and II) as the national framework for development. The NSGRP I was explicit on gender equality and equity and recommended that measures be taken to empower women to realize their right to access leadership positions at all levels (URT 2005). The NSGRP integrated gender in all of its three clusters. Goal one, cluster three states that Tanzania will "*mainstream good governance and gender into policies, plans, budgets and implementation mechanisms including gender monitoring and assessment indicators for good governance*" (URT 2005, 32).

## GENDER BUDGETING INITIATIVES IN TANZANIA

In 1997, the Tanzania Gender Networking Programme (TGNP), working under the Feminism Activism Coalition (Fem-Act), led a movement to launch the Gender Budgeting Initiative (GBI) in Tanzania (Rusimbi 2002). The GBI was a response to the cost-sharing and retrenchment policies that took place as part of structural adjustment policies in the 1980s and that left many people sidelined from policy making. In addition, the GBI was reinforced by the continuing gender inequality and inequitable resource allocation in social sectors (Rusimbi 2002). To address such challenges and advance the initiative in government circles, the GBI used mechanisms such as advocacy, lobbying, awareness creation, capacity building, and training. In response, the Government of Tanzania (GoT) embarked on a pilot project in 2000 that aimed to integrate gender issues into the budget processes of six selected ministries—Ministry of Water; Ministry of Agriculture and Food Security; Ministry of Health; Ministry of Education and Culture; Ministry for Regional Administration and Local Governments; and the Ministry of Community Development, Gender, and Children's Development—with the Ministry of Finance and Planning (MoFP) as the focal point (Rusimbi 2002). The efforts of the GoT and nongovernmental organizations (NGOs) in this area are seen as groundbreaking and inventive, revealing a hands-on intention of institutionalizing GRB. The remarkable advancement achieved by this

collaboration was observed in the government guidelines for the preparation of the Medium Term Plan and Expenditure Framework of 2000/01–2002/03. These guidelines called for capacity building on gender analysis in projects and planning, indication of gender objectives in action plans, use of gender-disaggregated data from sectoral planning units, identification of priority gender concerns for reducing gender inequality and inequities, and the setting of qualitative and quantitative gender monitoring indicators (URT 2000b). This approach has continued; similar points appear, for example, in the guidelines for preparation of 2020/21 plans and budget (URT 2019a) (see section 4).

Other advances include the establishment of an MoFP gender budgeting team that oversees the budgets of all ministries, departments, agencies, and local authorities to ensure that they include gender concerns, and the fast-tracking of GRB initiatives since 2010. In addition, the MoFP, as the key ministry coordinating the development of the budgets of all ministries and agencies, provides guidelines that are gender responsive. Among the landmarks is the development of a citizens' budget by the GoT in collaboration with CSOs since 2010/2011. This budget uses simple language to inform citizens about plans and budget allocations. The citizen's budget provides room for men and women from all walks of life to participate in planning and budgeting, enhancing the transparency and accountability of public funds.

NGOs' efforts to address gender inequality and women's inclusion in macroeconomic policies are notable and have influenced the government to review its policies and strategies to incorporate gender equality. In addition, various CSOs have been inspired to take the lead in building decision makers' capacity and advocating for gender mainstreaming in all plans, policies, and strategies. However, Tanzania still faces some challenges in incorporating gender concerns into budget programs and policies (Ampaire et al. 2016), as demonstrated by Tanzania's low ranking—130th out of 160 countries—on the 2017 Gender Inequality Index (UNDP 2018). According to our focus group discussions (FGDs) and key informant interviews (KIIs), the GoT is eager to see gender equality prevail in all areas, but given scarce resources, GRB has been poorly implemented. In addition, given that communities include diverse groups with different needs that are not well taken on board during the planning process, budgets are not gender responsive.

Oxfam in Tanzania and the other members of the Agriculture Coalition have played an influential role in addressing gender inequality in Tanzania for decades.<sup>1</sup> Their agenda includes ensuring that local and national budgets are gender responsive. These organizations have initiated various programs, including research-oriented programs, all geared toward GRB that leads to gender equality and eventually equitable and sustainable development that

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<sup>1</sup> The coalition members include the Agricultural Non-State Actors Forum (ANSAF), ActionAid, Forum CC, and TGNP.

addresses the needs of marginalized social groups. This research is one of those initiatives; its purpose is to map the budgeting process and outcomes, critically assess the current status of GRB in Tanzania, and examine how relevant and adequate it is in order support Oxfam's approach toward promotion of gender equality in the agricultural sector and beyond. This GRB research has been guided by the following objectives:

- To understand people's knowledge on and attitudes toward gender and gender-responsive budgeting;
- To outline the best practices on effective GRB advocacy strategies;
- To identify characteristics of budget processes and budget outcomes that make them gender responsive in general and meet the needs of women small-scale farmers in particular; and
- To suggest needed formal and informal systems and structures to be in place in order to facilitate effective GRB efforts.

## REPORT STRUCTURE

The remaining sections of this report are as follows: Section 2 presents the research methodology and approach. Section 3 dwells on the study findings from the field on people's knowledge and perception of gender and gender-responsive budgeting in Tanzania. Section 4 is about the budget processes for gendered budget outcomes. Section 5 highlights the characteristics and scope of women farmers, including large-, medium-, and small-scale farmers. Section 6 offers a summary, conclusion, and recommendations.

## 2. METHODOLOGY

### RESEARCH APPROACH

The research behind this report relied on a qualitative approach. The project ensured that all research participants identified in the terms of reference participated actively in ensuring that high-quality information was collected and analyzed. The primary audience consists of Oxfam and partner organization colleagues in the Agriculture Coalition and other Oxfam staff working in the gender and/or fiscal justice space. The secondary audience consists of organizations that focus on GRB and/or public financial management issues, donors, academic institutions, and other participants whose interest relates to the research aim.

### RESEARCH METHODS

The consulting team conducted a desk review, KIIs, FGDs, a participatory theory of change and learning session, and office visits. The team started with a half-day meeting with Oxfam officials and staff to deliberate on the technical aspects of the assignment and refine the objectives and purpose of the assignment, the proposed methodology, and the expected outputs. This meeting helped the team modify the methodology and initiate the work effectively.

#### **Office visits**

To find and review key documents, the consulting team visited key offices that have pioneered GRB: the Tanzania Gender Networking Programme (TGNP) and the Ministry of Health, Community Development, Gender, Elderly, and Children (MoHCDGEC). They also visited development partners to tap their accumulated experience relevant to this project. Given the policy responses to COVID-19 during the study, particularly lockdown, the team had to use more online documents and conduct interviews through phone calls and email.

#### **Document review**

The consulting team reviewed documents from CSOs, academic institutions, and ministries, as well as from other organizations and websites.

## Participatory theory of change and learning session

In cooperation with Oxfam, the consulting team conducted a one-day workshop on the participatory theory of change. The session brought on board Oxfam partners from different organizations including ActionAid Tanzania, Forum CC, Network for Small-Scale Farmers Groups in Tanzania (Mtandao wa Vikundi Vya Wakulima Tanzania-MVIWATA), and Policy Forum. The interactive nature of the workshop made it convenient for participants to discuss and map the system; they identified levers for change, conducted power analysis and stakeholder mapping, and noted the constraints and drivers related to GRB objectives. In addition, the group reflected on their advocacy approaches and tactics up to that point, considering what was working well and where there were gaps in charting the way forward. The workshop also acted as a learning session for participants and consultants given the issues raised in relation to GRB in Tanzania and in participants' respective institutions. The workshop deliberations and the resulting knowledge gained helped guide this study in terms of the issues it addresses and the methods it applies to collect data on the gender-responsive budgeting process.

## Key informant interviews

The team conducted KIIs with purposively selected officials from Oxfam staff; rural female leaders and female food heroes; local leaders from the three district councils (Kishapu, Kahama, and Hanang); and officials from the Ministry of Agriculture and Livestock Development, the Ministry of Finance and Planning, and CSOs. In total, 25 interviews were conducted. Some interviews were face to face, while others took place through phone calls and email correspondence (see Table 1).

**Table 1: KII respondents and tools used**

Organizations	KII tool			Total
	Face to face	Phone call	Email	
Local government officials	5	1	0	6
Ministries	0	1	2	3
Women leaders and female food heroes	10	0	0	10
CSOs/NGOs	2	1	3	6
<b>Total</b>	<b>17</b>	<b>3</b>	<b>5</b>	<b>25</b>

Source: Authors' field data.

## **Focus group discussions**

Focus group discussions (FGDs) were used intensively given their ability to bring together individuals from different backgrounds, ideologies, and characters. Seven FGDs were conducted—three in Hanang, two in Kishapu, and two in Kahama—with a total of 58 participants. The two FGDs in Kahama consisted of 7 women each. Of the two FGDs in Kishapu, one had 10 women and the other had 11 participants, of which 7 were females and 4 were males. Among the three FGDs in Hanang, one had 5 females, the other had 10 females, and the third had 8 participants—4 females and 4 males. The FGDs included rural women and men who have been involved in and benefited from projects receiving Oxfam support and other respondents from the local community, partners, and government.

## **ETHICAL CONSIDERATIONS**

Permission to conduct this study was accorded by the Office of the Vice Chancellor, University of Dar es Salaam, and then by the regional and district authorities of the respective study areas. The study team assured all respondents of confidentiality by promising that no names and/or photos would be documented without their consent.

## **LIMITATIONS OF THE STUDY**

The major limitation during the study consists of policy responses to the COVID-19 pandemic, including lockdown, which forced the researchers to conduct a number of KIs via email (see Table 1). This was due to the fact that most respondents did not offer their time for telephone conversations. Using email was challenging because the respondents did not respond on time and there was no room for an easy interrogation. In addition, a few respondents failed to respond to the questions despite having promised to do so. In spite of the limitations, the study was conducted, and almost 85 percent of targeted respondents were reached.

# 3. PEOPLE'S KNOWLEDGE AND PERCEPTION OF GENDER AND GENDER-RESPONSIVE BUDGETING

Understanding respondents' knowledge of gender and gender-responsive budgeting is useful given that there is a persistent perception that *gender* simply implies women's issues. That notion leads to a continued misunderstanding that policies, plans, budgets, and strategies are gender neutral. Despite the available policies and strategies, responsibility for fighting persistent gender inequality is typically left to women and CSOs focusing on women's and gender issues. Understanding people's knowledge of the concepts of gender and GRB can help researchers recommend appropriate mechanisms for policy makers and CSOs to effectively address gender issues and move toward achieving gender equality in all areas. This section describes knowledge and perception of gender and GRB among four groups: community members, political leaders, government officials, and NGO staff.

## COMMUNITY MEMBERS

Community members are not a homogenous group, and their knowledge of gender differs depending on their position, location, educational background, and access to the media, where some knowledge on gender is disseminated. Nevertheless, the majority of them have limited knowledge about gender. They use the terms *gender* and *sex* interchangeably and perceive them as meaning the same thing. This practice is partly influenced by the Swahili language, which draws only a very thin line between these two concepts (*jinsia* and *jinsi*, respectively). The responses from FGDs and KIs included the following: "*Gender means differences between men and women that is caused by their sex*" and "*Gender is the differences between women and men.*" In the discussions, most respondents said they had heard about the word *gender* during awareness-raising sessions on gender violence and women's rights and on planning and budgeting for the women and youth development fund.

Their understanding of GRB was limited to the budget for the special government fund that focuses on women, youth, and people with disabilities. Each district

council allocates 10 percent of its annual revenue collection to the creation of this fund, which focuses on those three categories of the population. Few respondents understood GRB as the budget planned in relation to different groups' needs and designed to enhance equality of opportunity and resource allocation.

## POLITICAL LEADERS

Political leaders include village chairpersons, councilors, and members of Parliament. For this report, we interviewed male and female councilors. We found that political leaders' knowledge of gender and GRB is influenced by their work experiences. Their understanding of the two concepts is similar to that of the community members who use the term *gender* interchangeably with *sex*. They refer to the women-specific budget as GRB. What limited knowledge they have about the two concepts comes from a few uncoordinated gender awareness-raising meetings and workshops offered mainly by CSOs and development partners. Such limited knowledge automatically limits prospects for GRB because political leaders have not learned how to identify gendered needs for the people they represent.

## GOVERNMENT OFFICIALS

The few government officials interviewed for this study, and especially those with a college education, had much greater knowledge of the terms *gender* and *GRB* than did grassroots community members. Some of these officials have had basic training and awareness raising on gender at college, attended classes or sessions about loans for men and women, and gained some understanding of women's funds as part of a women-in-development approach to gender budgeting. They perceive gender as the social relationships between and among men and women or the relationships between and among men and women. One official commented in a KII: "*Gender is the relationship between the different groups in the society, and that group includes the youth, elderly, children, and people with disabilities.*"

Officials with no college education learned about the concept through their engagement in projects dealing with land conflicts, which mostly affected women as a result of the country's patriarchal system. Some participated in rural training sessions facilitated by NGOs, including the Relief to Development Society (REDESO), TGNP, and Oxfam. Other sources are village meetings and seminars on topics like good governance, economic groups and project meetings for women and youth, and training by development partners. The media, the council

budgeting process, and government initiatives have also been sources of knowledge, though not adequate to allow officials to carry out gender planning and budgeting processes.

Officials' knowledge of GRB is mixed. For the majority, it means a budget that has a special fund made up of a targeted percentage of the total budget for marginalized social groups like women and people with disabilities (such as the 10 percent allocation toward the special fund for marginalized groups). To a minority, it means any budget that considers the needs of men and women according to their differences.

## NGO STAFF

NGO staff who participated in the study were from different organizational levels and had different amounts of professional experience, so their knowledge of the two concepts differed. All of them conceived of gender as a culturally determined social relationship between men and women. In the KIIs, they mentioned the influence of culture in shaping this relationship, which is unequal between men and women and is biased toward males in terms of accessing, owning, and controlling resources such as land and information and in decision making processes, with drastic results for the budgeting process. Staff gained knowledge on gender through various sources, including meetings, brochures and pamphlets, college classes, and training sessions on gender.

# 4. BUDGET PROCESSES TOWARD GENDERED BUDGET OUTCOMES

## BUDGETING PROCESSES AND PRACTICES IN TANZANIA

Public budget processes in Tanzania differ by level of government (i.e., village, ward, district, region, and ministerial), though all aim at socioeconomic development with people's needs at the center. The budgeting process is in accordance with the Constitution of the United Republic of Tanzania (URT 1977).<sup>2</sup> Given that the URT Constitution is gender responsive as expressed in its different articles, it means that even the budget must adhere to gender concerns. As expressed in Article 9 (d) and (g), the state authority and all its agencies are obliged to direct their policies and programs towards ensuring “*that the national economy is planned and promoted in a balanced and integrated manner*” and “*that the Government and all its agencies accord equal opportunities to all citizens, men and women alike without regard to their colour, tribe, religion, or station in life*” (URT 1977, 13). Other legal documents guiding budget preparation in Tanzania include the Public Finance Act, the Public Procurement Act (2014), the annual Appropriation Act, the annual Finance Act, the Local Government Finance Act (1982, amended in 2000), and the Public Audit Act (2008).

Furthermore, the Ministry of Finance and Planning (MoFP) develops guidelines for the preparation of plans and budgets to be followed by the ministries, independent departments, and agencies (MDAs); regional secretariats (RSs); local government authorities (LGAs); and other public entities (URT 2019a). These guidelines are based on the different legal documents that support achievement of Vision 2025.<sup>3</sup>

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2 Article 137 (1) states: “The President shall give directives to persons concerned to prepare and submit to the National Assembly in each Government financial year estimates of the revenue and expenditure of the Government of the United Republic for the next financial year” (URT 1977, 77). In addition, Article 137(2) states: “After the National Assembly has approved the estimates of expenditure (apart from the expenditure charged on the Consolidated Fund by this Constitution or by any other law) a Bill to be known as an Appropriation Bill shall be introduced into the National Assembly for the purpose of authorizing the issue from the Consolidated Fund of the sums necessary to meet the expenditure for the various activities of the Government involved in those estimates” (URT 1977, 77).

3 The 2020/21 budget guidelines were guided by the National Five-Year Development Plan 2016/17–2020/21, the Chama cha Mapinduzi (CCM) Election Manifesto 2015; government directives as per the president's speech while officially inaugurating the 11th Parliament of United Republic of Tanzania in November 2015; the Budget Act, CAP 439, and its Regulations; the National Anti-Corruption Strategy and Action Plan Phase III (NACSAP III); Government

For budget preparation for the financial year 2020/21, the budget guidelines were clear on gender concerns. The guidelines state that all accounting officers of MDAs, RSs, and LGAs should adhere to *Guideline of Service to Public Servants with Disability (2008)*, *gender issues, HIV/AIDS and non communicable Diseases* (URT 2019a, 41). In addition, the guidelines were clear on mainstreaming cross-cutting issues into plans and budgets: “*Accounting Officers are urged to allocate resources for the implementation of cross-cutting interventions including gender, environment, nutrition, climate change adaptation and mitigation, HIV/AIDS, people with disabilities, elderly, child protection, anti-corruption measures, good governance and the rule of law*” (URT 2019a, 49). In their general instructions, the guidelines recommend the allocation of 10 percent of own source revenues to facilitate empowerment of women, youth, and people with disabilities, as per the Local Government Finance Act, CAP 290 (37A) of 2018, and its Regulations of 2019 (URT 2019a, 51), where women and youth get 4 percent of the district council revenue each, while people with disabilities get 2 percent. It goes further to urge the empowerment of people with disabilities, women, and youth through the allocation of land and creation of user-friendly infrastructure for various social and economic activities and gender awareness in the budgeting process (URT 2019a, 41, 51).

After receiving the budget guidelines, the respective MDAs, RSs, and LGAs develop their budgets. The budget at this level goes through different processes, including special budget meetings where each department is represented by its head. Ministries develop their budgets according to the guidelines and submit them to the MoFP for approval. After approval at the MoFP level, the budget is sent to the budget committee and later to the Parliament for endorsement.

At the LGA level, in each district council the budget process starts at the departmental level; members of each department identify their priorities, which must be in line with government priorities for a particular year. The heads of departments are directly involved during the budget process and in presenting the developed budget to the full council committee. During the budget committee meeting, each department’s priorities are assessed for whether they conform to the budget guidelines and provide, for example, for the concerns of youth, women, people with disabilities, the elderly, and other vulnerable people. Such priorities must be consistent with government priorities. For instance, if the government’s priority in that particular year is education, LGA priorities must reflect that direction. Given that the MoFP is responsible for developing a ceiling budget for MDAs, RSs, and LGAs and that their budgets must be consistent with

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Loans, Guarantees, and Grants Act, CAP 134; the Sustainable Development Goals; the Development Cooperation Framework (DCF); and other regional and international agreements ratified by the government (URT 2019a, 40).

the government's internal and external revenue, expenditures, and national priorities, it has been difficult for such entities to achieve all of their goals.

Although the MDAs, RSs, and LGAs set their priorities in line with the MoFP budget guidelines, they also indirectly integrate some community needs at the village and ward levels. This means that decision makers involved in the budget process in the MDAs, RSs, and LGAs present community needs to be incorporated into budget plans without the community's direct participation in identifying such needs. KIIs revealed that budget committees and budget officers identify community gender needs during their extension work, in meetings with the community members, and through various research efforts, yet given the scarcity of resources, extension work has been minimal and research has been infrequently conducted. The resultant findings might be outdated, making budget implementation ineffective in relation to pertinent gender concerns.

At the village level the process starts with village community members, who identify development projects in relation to their needs at a village meeting. The identified needs to be included in the budget are sent for approval to the village council (where female representation is 30 percent, as facilitated by a special seats mechanism). The village council meeting is supposedly participatory, with both men and women invited and given a chance to speak. Given the patriarchal system, however, women's voices have been underrepresented, even where they were the majority at meetings, according to FGDs and KIIs. During a KII, one female respondent argued that even though women are present in the decision-making bodies at the village level, they have been unable to represent women's challenges. She stated, "*Women have been unable to make the arguments solid but only presenting them while lamenting. Such a situation makes it difficult for a presented challenge to be well integrated on key issues to be addressed [instead of being perceived] as just normal women's problems.*" She added, "*This is not something to blame them for, but it is because of the discriminatory and oppressive situation they have been facing with, that made scars in their life. Hence while presenting their issues, such a lamenting situation automatically arises.*" She argued that addressing women's issues will require empowering men to recognize women's scars so that they will not perceive women's problems as irrelevant.

After village council approval, the finance and planning committee at the village level identifies the needed resources through a designed budget. After the committee has identified the funds needed, they inform the village council, which approves and shares the decisions with the village members—it is the village members who make contributions for the development of the projects. The government provides some needed funds to support village projects, despite some challenges. In addition, some CSOs have provided support for the development of projects at the village level. If a project identified at the village level is to benefit the whole ward, then its budget is presented to the ward

development committee (WDC) for extra input and then sent back to the village council meeting for implementation. The district council planning offices, in collaboration with the WDC, identify their respective villages' projects and the resources needed for extra support, monitoring, and evaluation.

## CHALLENGES TO THE BUDGET PROCESS FOR GRB OUTCOMES

Despite clear and gender-responsive guidelines, the budgeting process faces many challenges. The main challenge remains lack of resources. The study noted that during the economic crisis resulting from climate change and other issues, many community members are not able to make contributions for project development. The budgeted projects take time to be implemented. Given scarce resources, the need to pursue government priorities, and the patriarchal system at the village level, the community's needs, particularly the needs of women, youth, and people with disabilities, are often not met in the planned time frame. Many times even the legally approved 10 percent allocation for the development fund for women, youth, and people with disabilities is not met, reducing the possibility of meeting these social groups' needs.

The study noted that it is only at the village and ward levels that budgeting is more participatory and community members are given the opportunity to express their needs and identify which are to be prioritized. Furthermore, according to the KIIs, the majority of the heads of departments in the MDAs, RSs, and LGAs are men. The low representation of women hampers the potential for making budgets gender responsive. Beyond the issue of gender representation, the majority of citizens and decision makers are unaware of gender needs owing to their lack of knowledge about the concepts of gender and gender-responsive budgeting. Moreover, the poor representation of key groups, such as women, girls, boys, and vulnerable men, according to their diverse needs, in the budget process from the grassroots level to the national level limits the possibility that their needs will be clearly identified and included. Furthermore, the MDAs, RSs, and LGAs lack gender-disaggregated data for use during planning and budgeting owing to infrequent research conducted in the respective MDAs, RSs and LGAs. Additionally, gender cannot be effectively mainstreamed if the planned budget is not specifically geared to such a goal.

The KIIs and FGDs findings revealed some challenges related to the nonparticipatory nature of the budget process. For example, even though the GoT sets aside 10 percent of the budget for youth, women, and people with disabilities, these groups are not well included in the budget process. Key

informants also argued that the amount of money for each particular group is too small (i.e. Tsh300,000–600,000), and not all people need loans in cash. Some might need equipment, agricultural inputs, or skills. Indeed, the poorest groups need grants rather than loans since they farm for subsistence and household food security and not for the market. Thus there is a great need to revise the approach to addressing targeted gender needs.

According to the FGDs and KIIs, farmers have also been poorly integrated into the budget process and plans, and when they are represented, those selected are often from organizations or academia and may not fully understand the diverse challenges facing poor and small-scale farmers. Both large- and small-scale farmers have their unique priorities, and the government has priorities too. Usually the government deals first with its top priorities (e.g., priority issues or crops), and groups that address those priorities get more attention in the budget. Most of the time the budget is based on a formula (e.g., agriculture gets a certain percentage) rather than on the needs of particular groups. Changing this situation will require political will. The study also revealed that gender desks, which monitor and audit gender issues in government policies, structures, systems, and programs in the respective ministries, have no power to challenge the budget process given that they are perceived to have a limited mandate centered on women.

## RECOMMENDATIONS FOR EFFECTIVE GRB AT NATIONAL AND LOCAL LEVELS

During the FGDs and KIIs, respondents proposed ways to address the mentioned shortcomings and shortfalls to ensure the effective participation of men and women in planning and budget processes. The recommendations are for budget committees, government officials, NGOs and development partners, and the community itself.

### **Budget committees at all levels**

For budget committees, respondents recommended the following:

1. Ensure that membership in budget committees is gender balanced, with an even fifty-fifty ratio of men to women, and that committees include representatives from all social groups, including economic groups.
2. Seek opportunities to acquire budget funds for raising awareness and knowledge about gender and GRB.
3. Design better communication systems for soliciting needs from the grass roots.

4. Become knowledgeable about and adhere to budget guidelines provided by the government.
5. Have a budget for regular training on participatory planning and budgeting.
6. Collect evidence and voices in support of providing subsidies and grants to small-scale farmers for the purchase of agricultural inputs and farm implements.

### **Government officials**

For government officials, respondents recommended the following:

1. Improve the system for gathering information from poor people and small-scale farmers at the community level to capture diverse voices as inputs into budgeting and to make feedback simple and accessible. Involve representatives from farmers' associations in budget committee meetings.
2. Use informal meetings, Tanzania Social Action Fund (TASAF) forums, *shamba darasa* (farmer training schools), and development groups to solicit priority needs of small-scale farmers, and use more information from TASAF groups in budgeting.
3. Allocate budgetary resources for training on GRB. Provide refresher courses on planning and budgeting for extension workers. Introduce gender studies at the primary school level and above. Ensure that councilors and MPs hold regular sessions with small-scale farmers to listen to and take into account their views and needs.
4. Establish boards for different crops, such as cotton, lentils, and sisal.
5. Provide budget guidelines on the compulsory training of government staff, especially planners and budget committees, on GRB to facilitate gender mainstreaming in budget processes and improve implementation of the policy and legal framework on budgeting.
6. Mobilize poor and small-scale farmers into economic groups where their needs and information can be collected, and provide entrepreneurship training to enable them to demand GRB.
7. Insist on the urgency of implementing GRB at lower levels. Complete the process of village land use planning with a participatory approach to ensure that women get land title deeds.
8. Review the Gender and Women Development Policy (2000) in a participatory manner and disseminate it to community leaders to be used as guidelines for

- relevant policies and laws such as the land policy and laws and the government planning and budgeting process.
9. Encourage women to attend and participate in formal village meetings and in leadership by including agendas and debates related to gender.
  10. Increase the number of well-trained and gender-sensitive extension agents with the goal of providing at least one in every village.
  11. Increase the share of agriculture in the national budget in line with the Malabo Declaration, which obligates Tanzania to allocate 10 percent of its national budget to agriculture (the highest allocation was 6.05 percent in 2013/14; in 2018/19 the allocation was 1.9 percent).
  12. Provide legal education to small-scale farmers.
  13. Raise women's self-confidence.
  14. Establish special seats for youth, as is done for women, at the village council and hamlet (*Kitongoji*) levels.

## **Communities**

For communities, respondents recommended the following:

1. Demand awareness raising and knowledge access on gender and GRB for farmers groups, women, and youth economic groups.
2. Demand economic empowerment through budget allocation and training opportunities and programs for raising self-confidence and improving community members' knowledge base on policies, laws, and GRB.
3. Demand information on budgets, and provide feedback on the use of budgeted funds as audited by the relevant authority.
4. Hold government and political leaders accountable for using budgets to meet community needs.
5. Use self-empowerment strategies to engage people in GRB processes, and seek best practices through farmers' associations, CBOs, and cooperatives.
6. Use informal associations and traditional leaders as well as peoples' representatives to challenge the gender-blind structure, systems, and practices in both the community and the government.

## ADVANTAGES AND CHALLENGES OF PARTICIPATORY PLANNING AND BUDGETING PROCESSES

Respondents noted that budget decision makers need to be aware of all the different needs of men and women small-scale farmers. During FGDs and KIIs, respondents noted the following:

1. Men and women face different challenges because they experience life differently owing to gendered roles and responsibilities. They thus have different needs that budget developers and planners must address through different approaches.
2. Greater awareness of the needs of small-scale female and male farmers will likely make budget planners feel more responsible for and committed to addressing those needs and to monitoring the mainstreaming of gender in the budget process at all levels.
3. Budget developers and planners must follow up at higher levels (i.e., Parliament and the full district council) and send feedback to the community on budget decisions, expenditure audits, and so on. They should also effectively use existing local government decision-making structures and systems like village assemblies.
4. To enable the budget to respond to the diverse needs of men and women small-scale farmers, budget developers and planners should involve farmers in needs identification and engage in frequent client-oriented research.
5. It is important to collect views from small-scale farmers, especially women, who are normally silent at meetings owing to the patriarchal system.
6. TASAF groups should be used to identify poor community members and mobilize them into economic groups whose representatives can be incorporated into budget committees.

Emphasizing the need for women voices to be heard, one respondent during the FGDs and KIIs had this to say:

*Women experience life differently as they play a multiple of roles different from those of men. They also face double discrimination in the home and at a public level, and their concerns are often overlooked in plans and budgets. Women are also culturally discriminated [against], especially on matters related to decision making and asset control and management. In addition, the women in livestock keeping continue to be more vulnerable, particularly in*

*decision-making bodies, thus their needs continue to be not featured in budgets. There is a great need to empower them to contest for leadership positions.*

The findings revealed that representation for women ensures that their voices can be heard. The need for women's representation that gives them a voice to present their own interests is justified on the grounds of both human rights (individual right to representation) and democratic good governance (representativeness of the legislature). Women's representation in decision-making organs that deal with budgeting can thus be a politically powerful and democratic tool that is expected to make a difference both in women's lives and in the community at large. As the Beijing Platform for Action (UN 1995, para. 181) notes, "*Women's equal participation in decision-making is not only a demand for simple justice or democracy but can also be seen as a necessary condition for women's interests to be taken into account.*"

Mechanisms are needed to facilitate this "exercise of voice." In a democratic society, exercise of voice is facilitated partly by the electoral process, which translates principles of inclusiveness and popular participation into reality, allows both men and women to articulate their interests, and provides alternative participatory frameworks that guarantee opportunities for diverse voices to be heard during the planning and budgeting processes. Participating in budget processes is part and parcel of good governance where public resources are mobilized and shared for equitable and sustainable development and where men and women express their needs and exercise their right and freedom to participate fully in making decisions on matters affecting them, their well-being, or the nation. The important question at this point is, How will the budget developers know about such needs and concerns?

The process of capturing peoples' voices must be facilitated by democratic and efficient policies, laws, systems, and structures both at the grassroots level and in government and political operations. In Tanzania these systems and structures do exist, as discussed in section 1 of this report. The farmers in their diversity, as noted, cannot express their needs in the absence of such structures and systems. In Tanzania, as explained elsewhere in this report, the Gender and Women Development Policy (2000), the Agricultural Policy (2013), the national election laws, the land laws (1999), and the local government system allow for the representation of women and other social groups in budget committees. These mechanisms provide information on the needs of various groups. Furthermore, as respondents noted, government extension agents meet people during field work and learn about their concerns, which constitute useful input into the planning and budget processes. Asked how budget developers and planners can capture such diverse interests and needs, respondents first acknowledged the need for budget officers to seek out the voices of every social group using a participatory or bottom-up approach to planning and budgeting.

Participatory budgeting and planning are therefore a step toward effective policy implementation, which is the responsibility of all stakeholders. Participation in budgeting has been empowering for communities, not only by giving them access to knowledge on existing policies and laws but also by raising their awareness of gender and GRB. As expressed by some of them, the process contributed “empowerment of small-scale male and female farmers with knowledge on their rights and the use of new technology—e.g., drip irrigation for the greenhouses.” The benefits of participatory planning and budgeting as identified by the respondents include increased mobilization of women and youth into development groups (thus challenging myths about the capabilities of poor people and women), formation of farmers’ organizations to facilitate efficient marketing strategies for their crops, gender awareness raising, training on gender-based violence and participatory approaches to development, and training for community groups on HIV and AIDS, nutrition, home gardens, and other topics.

Ultimately, participatory planning and budgeting are fundamental mechanisms for engaging citizens in the effort to realize sustainable and equitable development and to achieve the SDGs. All respondents involved in the study agreed that the following are important in engaging communities in participatory budgeting and planning: (1) a conducive policy framework; (2) strong local/mayoral leadership; (3) enabling local political and cultural factors; and (4) capacity to manage engagement and partnership. Participatory budgeting is a way of promoting good governance through increased participation, accountability, and transparency.

The respondents discussed GRB challenges and proposed remedial measures. One challenge noted is the patriarchal culture that discriminates against women and other marginalized groups and where women and youth are often not considered or do not consider themselves decision makers. Others include a lack of knowledge on GRB on the part of communities and most government officials, lack of community knowledge on gender, lack of government commitment to promoting GRB and providing training on GRB, and lack of auditing of gender-responsive achievements. Another challenge is the diverse nature of partners’ objectives, targets, intended outputs, and funding, which makes harmonization of targets difficult. In addition, it can sometimes be difficult to motivate the community to attend and participate fully in meetings because some have lost interest in attending such meetings.

Managing peoples’ participation is another area of concern. User-friendly and democratic systems and structures like established committees and village meetings may exist, yet some peoples’ voices may be marginalized, or some, like women, may lack confidence to speak in public. An efficient monitoring and evaluation system must be put in place to track the process to ensure that all

voices are heard and considered in budgets. Undoubtedly, participatory planning and budgeting empower communities in multiple ways, including making them policy and legal literate. Hence community members are prepared to challenge those who violate their legal rights. They can also demand their rights, including the right to be involved in budgeting processes to express their needs, either directly or through their representatives; the right to get feedback on budget decisions made at higher levels; and the right to audit how the budget relates to their priority needs.

Participatory planning and budgeting constitute the only way to attain GRB that is in compliance with the principles of democratic governance. People can get involved in all phases of the budget process and cycle (see Figure 1). Citizens may be engaged in formulating the budget, reviewing and analyzing the budget, tracking expenditures, or implementing audits and controls. In each of these phases, citizens can contribute to the formulation of a more transparent, participative, accountable, and responsive budget.

# 5. CHARACTERISTICS, NEEDS, AND CHALLENGES OF TANZANIAN FARMERS

## CHARACTERISTICS OF FARMERS

In Tanzania, agrarian societies comprise males and females, but they are not homogenous groups. Given their heterogeneity, they do not access and control resources and opportunities equally. Farmers include large-, medium-, and small-scale farmers, both men and women, of different age groups, and each of these categories has specific characteristics and needs with different consequences for the budgeting process.

### **Large-scale farmers**

Large-scale farmers, also known as commercial farmers, operate on a large, profit-making scale. Commercial farmers aim to maximize yields per hectare so as to realize big profits. Such a farming system flourishes where transport and market infrastructure are well developed and where technology is well advanced. Large-scale farmers also practice extensive farming on large plots of land that demand the use of machinery and modern agricultural inputs like fertilizers, herbicides, and pesticides. There are few females in this category of farmers, partly because of patriarchal discrimination with regard to critical productive resources (such as land, labor, capital, and decision-making powers), lack of women's ownership and control at the household level, and women's limited entrepreneurship capacity because they have been culturally assigned to the domestic and subsistence sector. The needs of this group therefore differ from those of other farming groups.

### **Medium-scale farmers**

Medium-scale farmers produce for the market but on a smaller scale than the large-scale farmers. Their needs are mostly the same as those of large farmers; the differences lie in the volume and scale of production and associated inputs and other requirements for farming activities. These farmers may use mechanized or labor-intensive agricultural systems and may have the same or similar political influence as large-scale farmers. Women are in the minority, but the situation differs according to the strength of the patriarchal system and

socioeconomic empowerment among women. In areas where women are economically empowered and the patriarchal system is inactive, women are found among medium- and large-scale farmers. Yet given Tanzania's sociocultural challenges, the majority of women engage in small-scale and subsistence farming.

### **Small-scale farmers**

Small-scale farmers generally practice intensive farming mainly for subsistence, and their yields depend on large amounts of labor. These farmers normally produce enough to meet the food needs of themselves and their families, with no surplus to sell for profit. This is the most common form of farming for women farmers, and their needs are totally different from the first two types.

## **NEEDS OF FARMERS**

Farmers' needs depend on their farming system, including the size and magnitude of their production, as well as the type of crops they grow and the location of their farm. Wherever they are and whatever farming system they use, farmers share certain needs while other needs diverge depending on whether they are larger or smaller in scale.

### **Large- and medium-scale farmers**

Respondents to the FGDs and KIIs noted that large-scale farmers need and use modern technology and machinery, hired technical labor, and modern farm inputs in large amounts owing to the size and nature of their farms. Both large- and medium-scale farmers have the capacity to borrow, and they can supply large markets. They need efficient transport infrastructure and modern storage facilities as well as a more sophisticated information network for critical news on markets, weather, new technologies, and other topics. They need to collaborate closely with the government on policies and laws governing the whole value chain of their products. They are favored by the government partly because they contribute handsomely to the government's revenue collection and partly because their needs are usually prioritized in the government budget.

### **Small-scale farmers**

According to the FGDs and KIIs, small-scale farmers, especially women farmers, have specific needs related to their system of subsistence production. Like all other categories of farmers, they share the general farmers' needs mentioned above, but in some cases the need is in small volumes or amounts. Yet very poor women also need grants, like those in TASAF projects, to buy inputs and, for the

landless, to rent land. Small-scale farmers need good transport infrastructure as well as more affordable and appropriate transport technology and ordinary transport facilities for their crops. They need improved, efficient, and affordable storage facilities and subsidized inputs and user-friendly markets for the small amounts they sell to meet immediate cash needs. The KIIs noted that they need a simple information network system to access and disseminate market prices and weather information, and they need more extension services than the large farmers, who can access information from the media and other modern sources. The FGDs revealed that they also need gender awareness raising and knowledge on budgeting, given the limited access to both basic and technical/professional education experienced by the majority of female farmers. Such training would empower women farmers to better articulate their needs and engage effectively in participatory planning and budgeting. Finally, they need more interaction with their representatives, including budget committee members, councilors, and members of Parliament, to chart out priority needs to be incorporated into budgets.

## ESSENTIAL CATEGORIZED FARMERS' NEEDS TO BE INCLUDED IN POLITICS AND BUDGETS

Farmers are a diverse socioeconomic group with significant differences in the type and magnitude of their essential needs. This diversity determines the different positions and locations they occupy in the agricultural sector. The needs of these categories of farmers are in some cases similar and in some cases different, based on the location and position they occupy in the agricultural sector and in society at large. According to the FGDs, large and small farmers all need, for instance, efficient and accessible markets for traditional and nontraditional crops including food crops, modern farm inputs, training and information, technology (especially for processing and preserving crops), storage facilities, capital, land, and labor.

However, the manner in which such needs are to be met differs for different types of farmers. The needs for men and women also differ as they relate to each group's productive and reproductive activities. The need for information, for instance, would differ depending on what men or women produce and sell, and meeting those needs in the budget would depend on the capacity of each sex to express their needs. Gender issues pertaining to women farmers specifically include

*lack of ownership and control over agricultural land and security of ownership; high cost of improved seed and other technologies which cannot*

*be afforded by women and the poor; low extension service delivery to women compared to men; excessive sale of food crops by male heads of households, hence threatening household food security; low exposure to agricultural and market information; lack of business/entrepreneurship skills (TGNP 2018, 10).*

A gender-responsive budget would have to consider all these diverse needs.

## CHALLENGES IN INCORPORATING DIFFERENT FARMERS' NEEDS IN NATIONAL AND LOCAL BUDGETS

The discussion on incorporating the needs of men and women in local and national budgets generated mixed responses from the respondents. First, it must be emphasized that neither men nor women constitute a homogenous group; diverse needs are found within both groups. Second, the majority of respondents mentioned that they are not knowledgeable about the agricultural budget process at the national level; the little knowledge they have is on village plans and budgets.

FGD respondents with some knowledge of the budget process noted that plans and budgets are not focused on diverse needs but rather on general farmers' needs such as markets and loans for inputs and storage for surplus harvests. Only a few farmers who grow strategic crops already enjoy substantial access to these things. FGDs and KIs revealed the challenges in incorporating different farmers' needs into national and local budgets. First, budget planners continue to be biased toward meeting the needs of male farmers, particularly large-scale male farmers whose produce contributes to national and local revenue. Only a small amount of money is allocated to small-scale farmers. For example, the government's fund for women, youth, and people with disabilities is too small compared with their needs for land, technology, agricultural inputs, capital, and markets; only a few women are able to access loans. Additionally, it has been easier to identify those who need loans than those who need grants and subsidies, and the latter have thus often been ignored. The findings disclosed that local government leaders lack the capacity and data to identify vulnerable smallholder farmers; some leaders who are aware have overlooked the needs of small farmers, and others are corrupt. Funding to provide training on the government budget is either lacking or inadequate, especially for training on gender and gender budgeting. The budget allocation for extension work is also limited, affecting poor rural women most severely.

## NGOS' AND CSOS' EXPERIENCE IN INCORPORATING FARMERS' GENDERED NEEDS

Local and national NGOs and CSOs are expected to find ways of learning about farmers' diverse needs and then to incorporate them into their budgets. Experiences differ from one stakeholder to another. The study findings showed that among NGOs and CSOs that have attempted a gender-responsive budgeting process, the situation was much better. NGOs are better at incorporating the gender needs of different categories of farmers than the government is, because NGOs have developed the capacity for gender-responsive budgeting.

Furthermore, some NGOs and CSOs were established precisely to promote gender equality and equity, and their budgets reflect this intended outcome. These same NGOs and CSOs have done a good job of raising awareness of gender and GRB among government officials through training and awareness-raising sessions as well as by implementing joint projects with the government or supplementing government efforts such as women's and youth development projects. Examples are Oxfam, Rural Urban Development Initiatives (RUDI), and Relief to Development Society (RUDESO) projects on food security, climate change, gender equality, greenhouses, and beehives. Other examples include projects to meet the specific needs of the poor, such as subsidies for agricultural inputs, grants instead of loans, support for low-income women's groups, and market surveys for the groups' products. In their budgets, some NGOs and CSOs have incorporated training on GRB and gender issues as well as simple and appropriate technologies for weeding, transporting, and processing food crops; projects that save poor women's time and energy while producing surplus products; and funding for mobilizing and promoting economic ventures for groups of rural and poor women. Government budgets often ignore these needs because they are not cost-effective and do not generate revenue. However, respondents made several recommendations to help NGOs achieve their goal of seeing gender concerns in national and local budgets and plans:

1. NGOs should provide technical support to the government on participatory planning and budgeting, as well as on grants to poor farmers and to village development projects.
2. NGOs should increase advocacy, training, and technical support on GRB to the government and CBOs, and on gender awareness and participatory planning to community and budget committee members at all levels.

3. NGOs should work closely with community and network members to identify communities' gender needs and mobilize funds from within and outside the country to facilitate GRB and the implementation of budgeted programs.

# 6. SUMMARY, CONCLUSION, AND RECOMMENDATIONS

## SUMMARY AND CONCLUSION

This study has noted several identifiable achievements, of which the most successful is the mainstreaming of gender in the policies that guide the budget process. Budget processes in Tanzania are seemingly legally geared toward gendered budget outcomes through policies and laws as well as the structures established for gender budgeting. In addition, CSOs have made contributions by lobbying and advocating for GRB, leading the government to amend its policies to place gender equality and needs at the center of budgeting and planning. However, Tanzania still faces challenges in effectively institutionalizing gender budgeting. These challenges are multifaceted and demand a multifaceted response.

First, there is a lack of frequent collection and analysis of gender-disaggregated data, which are crucial for identifying changing gender needs and gaps and effectively including them in the budget process. Policy makers tend to misperceive women and men as homogenous groups and misinterpret the concept of gender as connoting only women rather than men and women in all of their diversity. Second, resources to implement GRB are inadequate in spite of the express recognition of the importance of gender mainstreaming in policy documents. Third, budgeting processes in the MDAs and LGAs are not participatory. Local needs continue to be conveyed by representatives rather than articulated by local people themselves, leading to a mismatch between real local needs and planned and budgeted actions.

Fourth, MDAs, LGAs, and grassroots actors have limited technical capacity in relation to gender. This impedes their ability to lobby for budgetary allocations targeting gender activities and to set indicators for assessing and monitoring government budgets and plans. Fifth, the CSOs that have pushed the GoT to develop its plans and budget with a gender focus through various measures (lobbying, advocacy, capacity building, sensitization) have inadequate resources to continue this work. It is especially difficult for them to reach all of the targeted people in the MDAs, LGAs, village and ward councils, and communities at large.

Sixth, there are few females in the category of large- and medium-scale farmers, partly because women face discrimination in the areas of critical productive

resources (land, labor, capital, decision-making powers), they lack ownership and control at the household level, and they often have limited entrepreneurship capacity because they have been culturally assigned to the domestic and subsistence sector. Most female farmers are small-scale farmers who generally practice traditional farming and focus on subsistence agriculture. Their needs have rarely been addressed and are often overlooked during the budget process.

Other challenges identified include the patriarchal culture that excludes and discriminates against women and other marginalized groups, lack of knowledge on gender and GRB among community members and most government staff, lack of government commitment to train staff on GRB, lack of auditing of gender-responsive achievements, and difficulties in motivating community members to attend and participate fully in meetings.

## RECOMMENDATIONS

In light of the challenges described, this report makes several recommendations.

First, the MoHCDGEC, which is responsible for spearheading gender equality and equity, must take the lead in ensuring that key indicators are developed for assessing and evaluating government plans and budgets.

Second, the MoHCDGEC must develop a research and funding unit, in collaboration with academic and research institutes and CSOs, to produce the gender-disaggregated data needed for the plans, budget inputs, outcomes, and monitoring and evaluation for all MDAs, RSs, and LGAs. To render such an initiative effective, data should be disseminated frequently to share findings and create awareness.

Third, given the lack of government resources available to implement GRB effectively, especially for building staff capacity, CSOs should use effective and cost-effective mechanisms to take a supporting role in this area. They should, for example, use online training to train a pool of trainers in the respective MDAs, RSs, and LGAs. These trainers can continue sharing knowledge and also act as key staff during budgeting and planning by analyzing whether budgets' outcomes will lead to gender equality.

Fourth, CSOs, in collaboration with the MoFP and the MoHCDGEC, should develop clear gender equality indicators for each sector (such as agriculture, education, and health) that the GoT, CSOs, and donor countries can use to monitor and evaluate budgets and plans. The availability of such indicators will make the GoT accountable for its budgetary and policy commitments and hence promote more gender-responsive budgets and policies. Moreover, this strategy will attract funds, especially from organizations that are pushing for gender

equality and equity in the respective sectors and for successful attainment of the SDGs.

Finally, there is a need to ensure the participation of community members—men and women in all of their diversity—in the budget process as they are key to the identification of gender-disaggregated data that will make the inputs and outcomes of budgets and plans gender responsive.

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