



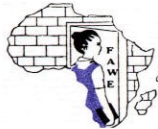
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Sustaining Investments in Girls' Education through Gender-Responsive Budgeting

Policy brief Prepared by



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"Supporting Girls and Women to Acquire Education for Development"

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I. INTRODUCTION

Education in sub-Saharan Africa, particularly for girls and women, continues to be adversely impacted by a variety of interrelated socio-cultural, economic, financial and political factors. Despite the quantitative leap the continent has made in primary school enrolment in the past decade, access to education and survival rates for African girls are far below the world average, particularly at secondary and tertiary levels (UNESCO, 2007). The GMR 2008 also warns that in many African countries, on top of the serious quality limitations of the sector, “there exists the risk that gender disparities will remain even in 2025, in either primary or secondary education, or at both levels, if efforts are not strengthened to improve access and participation of both boys and girls in schools” (p. 183). The picture is bleaker at tertiary level.

The education sector in Africa has been weakening since the 1980s, as a result of budget ceilings stipulated as conditionality for loans from multilateral agencies. This led governments to drastically cut spending on social services, such as health care and education. Consequently, many African countries instituted user fees for access to education, which proved to have adverse effects on citizens, families and communities, especially those from rural, minority or impoverished backgrounds. This also exacerbated gender inequality in Africa as girls and women from these backgrounds were even more affected given that user fees are one of the major deterrents for families to invest in girls’ schooling. This has been happening in the face of irrefutable evidence that educating girls and women is the best investment a country can make to increase social welfare and economic productivity and prosperity.

II. WHY IS IT IMPERATIVE TO SUSTAIN INVESTMENTS IN GIRLS’ AND WOMEN’S EDUCATION?

Following the increasing recognition over the past two decades that education is a basic universal human right and a means of self and social empowerment, many African countries are signatories to declarations that have set targets for achieving gender parity in enrolment and gender equality in education, as specifically stated in the Education for All (EFA) targets 2 and 5 and the Millennium Development Goals 2 and 3 in 2000.

Moreover, countless studies conducted internationally and nationally have demonstrated that girls’ education is one of the key levers for fighting poverty and for spearheading the socio-economic progress of nations. Research highly correlates girls’ education with women’s increased participation in the labor market leading to higher GNP and GDP, increased income for families, improved maternal and child health, better educated children, and a host of other socio-economic benefits.

It is demonstrated that women who have received even limited formal schooling are more likely to seek medical care, to immunize their children and provide them with adequate nutrition, and have improved hygiene. According to the World Bank for each additional year of formal

education that a mother receives, her child has more chances of staying in school for an additional one-third to one-half year (www.worldbank.org). It has also been estimated that for every additional year a woman is educated, the likelihood of her experiencing a child-related death decreases by 10% and her wage likely increases by 20%.

Economists such as Elson (2002) have shown how failure to invest in women's education gender inequality reduces agricultural yield and reduces economic productivity. In so far as the majority of African citizens are women and that increasingly more women contribute to the productive sectors of the economy, it makes economic sense to invest in female education to harness women's potential and maximize their actual contribution to the socio-economic progress of the continent.

It is clear that in its quest for social, political and economic prosperity, Africa can no longer afford to leave half of its citizenry by the way side and can no longer neglect to provide fundamental opportunities that will uplift at once the individual, the family and the society. The cost is too high! It is a fact that no society can progress when half of its population is marginalized due to lack of knowledge and skills required in the development process.

Meeting the educational needs of girls and women requires using ways and means to make equality of educational access and opportunities possible for all, especially girls and women from marginalized or excluded groups. One way to achieve this goal is to deliberately and systematically dedicate adequate financial resources for addressing the specific needs of such groups while still investing in social sectors at the macro level. This is commonly called gender budgeting.

III. GENDER-RESPONSIVE BUDGETING (GRB): A SURE MEANS OF PRESERVING GAINS AND SECURING FINANCING FOR GIRLS' EDUCATION

1. What is Gender-Responsive Budgeting?

Gender-responsive budgeting (GBR) is a systematic process during which a range of analytical tools and strategies are applied to all stages of budgeting and resource allocation with a goal of promoting gender equity and equality in the distribution of public sector revenues. It works from the premise that the budget is not "a gender neutral policy instrument" (Elson 2002), but that, depending on how it is prepared and how it is expected to be used, it can have either have a positive or adverse effect on its recipients, the men and women, girls and boys of a nation. Budgeting with gender equality in mind is one sure way of ensuring that gains made in girls and women's education are not lost due to government disengagement. Gender budgeting can be used to ensure that girls and women, the poor and the disadvantaged are guaranteed a minimum of a basic educational cycle; by redirecting the burden of educational cost from households to the public sector, it can actually allow for more families to be able to educate both their daughters and sons.

2. Key GRB Strategies for the Education Sector

The strategies can be used by themselves, or in combination, to create a more gender-balanced budget that is responsive to the needs of various beneficiaries, be they male or female.

- ***Engendering the general Public Sector budget*** - This requires systematically identifying the needs of both males and females and how government spending can meet their differential needs. It usually requires a cross-sectoral approach (collaboration between ministries of education, finance, and gender for instance) and the analysis considers how gender interacts with factors such as socio-economic class, residence, race, ethnicity etc. to impact educational access and opportunities for males and females. Typical questions are: who benefits and who is excluded from government spending? To what extent? Which types of males and which types of females have access to public education? What are the costs borne by the various beneficiaries etc.? Answering these questions using a gender lens and sex disaggregated statistics can actually lead to more equitable allocations within the Public Sector budget.
- ***Targeted expenditure by gender*** – This can be used for instance in the case of special initiatives for groups facing specific disadvantages in the education sector: i.e. for nomad girls, girls with disability, or girls living in remote communities, or boys living in communities where premature child labour or early emigration is practiced.
- ***Affirmative action or quota-based budgeting*** - This usually points to compensatory financing mechanisms or transfers that seek to address equity and/or parity issues– i.e.: setting aside funds or positions for women to help, for instance, redress gender imbalances in teacher recruitment or promotion within the administration; creating incentives to attract more female teachers to rural areas; or budgeting for additional training opportunities to increase the proportion of female mathematics teachers, among others.

3. Conducting Gender Budgeting for Education

The following processes/steps are generally recognized as necessary in conducting gender budgeting

- ***Situation/Needs Analysis***: examine the categories of males and females in the education system or sector (actors/beneficiaries, demographic data). Analyse sex-disaggregated education data to capture gender differences?
- ***Gender-based policy analysis or gender audit***: to what extent the education policies pay attention to gender issues or respond to the needs of males and females? Are gender

considerations captured at all levels of the sector? Does the policy provide a guiding framework for budgeting in a gender-responsive manner?

- **Cost assessment (visible and invisible):** Are adequate revenues allocated to meet the needs of actors/beneficiaries. Are the resources targeted at the right beneficiaries? What indicators are used to determine actual costs?
- **Outputs/service provision assessment:** Are the resources allocated spent adequately to achieve the expected results?
- **Impact assessment:** Have the approaches used and the resources spent contributed to gender parity or equality in the education sector?

These various stages correspond more or less to activities, inputs, indicators, outputs, and performance used in conventional budgeting exercise. However it is worthwhile to point out that GRB for social sectors such as education is a complex process that works best when linked with a country's macro-economic and financial policies. It needs to be contextualized nationally and locally (i.e. whether in a centralized or decentralized context) and supported by both quantitative and qualitative data analysis. The cross-sectoral nature of GRB cannot be overemphasized given that various social sector ministries must collaborate with the Ministry of Finance to make it a reality at the national level. It is also crucial to anchor GRB in the political, legal and legislative context of a country in order to ensure that it is part and parcel of national policy reform or gender mainstreaming efforts. When done properly, GRB yields tangible results as evidenced in countries that have been applying its principles, specifically in the education sector.

IV. GOOD PRACTICES FROM COUNTRIES THAT INTEGRATE GENDER IN EDUCATION BUDGETING PROCESS

Although GRB has often been championed by NGOs in Africa, it has been implemented by governments of Tanzania, Uganda Mozambique, Malawi, Ethiopia, Rwanda and South Africa, among others, with varying scopes and degrees of success. Below a few examples are listed.

- **Uganda:** Following the publication of a White Paper as early as 1992, the government decided to provide free education to 10% of boys and 20% of girls at primary school level; 25% of girls nationally were also granted free secondary education. By 1997, Uganda had achieved Universal Primary Education (UPE) and gender parity in enrolment. Later on the government decided to offer free education to up to four children per family, at least two of whom must be girls. This has greatly increased girls' access to education but disparities persist in certain parts of the country, especially when it come retention and achievement.

- **Tanzania:** The government has increasingly implemented gender-responsive policies backed by targeted gender-based budgets to provide free boarding for girls, establishing a quota system for girls entry into secondary schools and providing incentive to female teachers of mathematics and science. Tanzania is also faring as well as Uganda in terms of access to primary education and parity in enrolment.
- **Mozambique:** Mozambique is also faring well in access at primary level. For the past decade, the country has put a lot of emphasis on the promotion of girls' participation in technical and vocational education by providing incentives to female students constructing boarding facilities and setting aside a little under 1% of its budget for its gender-specific programmes in education.
- **Malawi:** Malawi has also overcome many challenges at the primary levels by using strategies such as fee waivers, and later free primary education nationally to increase girls and boys enrolment. Despite these efforts, females are still at a disadvantage at the tertiary level.
- **Ethiopia:** The Government of Ehtiopia has a guideline jointly produced by the Minister of Finance and Economic Development and the Minsitry of Education to showing officials and development practitioners how to mainstream gender in the budgeting process. This was preceded by a national policy on women and the set up of a national machinery and an ongoing implementation of international commitments for addressing gender equity concerns. These efforts have translated in near parity at primary level and great improvements in access at secondary level.

The brief examples above are encouraging in that they demonstrate that many African governments are committed to meeting the goals of gender parity and equality in education. While the measures and strategies that are adopted do not always yield the fruits expected, at the scale expected, the successes registered in countries such as Rwanda, Botswana and South Africa confirm that it is indeed possible for Africa to achieve these goals. A lot can be learned from the successful approaches and adapted in other countries still facing the challenges of educational access and participation for girls. The forum for dialogue between the two key ministries that hold the future of African education provides a golden opportunity to put gender-responsive financing of education on the policy agenda. The Ethiopia experience is an excellent model on how dialogue between the two ministries can be translated in practical implementation. One thing remains certain: gender-neutral or gender blind budgeting is no longer sufficient if Africa wants to maintain the gains that it has made over the past decade toward gender parity and equality in the education sector.

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