

TANZANIA GENDER NETWORKING PROGRAMME

A CASE STUDY ON STRATEGIES FOR TRANSFORMING AND MAINSTREAMING
GENDER INTO
NATIONAL PLANNING AND BUDGETING PROCESSES

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MACRO-ECONOMIC POLICIES IN TANZANIA

THE CASE OF GENDER BUDGET INITIATIVE (GBI)

Presented by: Mary Rusimbi, Executive Director,
Tanzania Gender Networking Programme (TGNP)

THE GENDER BUDGET INITIATIVE, TANZANIA

In this case, a Tanzanian NGO/Coalition committed to achieving gender equality and women's empowerment objectives illustrates the potential of collective action for influencing/supporting government to achieve transformed policy changes and budget with a gender perspective.

Background

A. About Tanzania Gender Networking Programme (TGNP)

TGNP is a non-governmental organisation that was registered in 1992 and has been effectively operative since 1993. It is mainly engaged in facilitating the achievement of women's empowerment/human rights through promotion of social transformation and gender equity and equality. It achieves the above through methods that employ animation, networking, outreach, policy advocacy, collective action, consensus building and action oriented participatory research. TGNP's partners in the gender and civil society transformation process are mainly like-minded organisations, individuals and various social groups in the country and beyond. The above activities are operationalised through its three major programmes: Training and Outreach, Information Generation and Dissemination, and Activism, Lobbying and Advocacy. The Case Study under discussion falls under TGNP's Activism, Lobbying and Advocacy programme.

The Gender Budgeting Initiative began as an NGO process involving more than 20 NGOs. It is a lobbying initiative developed as part of TGNP's and Feminist Activism Coalition (FemAct) vision of reviewing and influencing the conceptual paradigms, particularly among policy makers, economists, statisticians and researchers to adopt more progressiveness and gender approaches. The GBI was developed in the context of cost sharing and retrenchment policies implemented as part of structural adjustment programs in Tanzania in the 1980s. These programs precipitated vital social services, particularly health care and education, being dramatically cut at the same time as liberalisation and privatisation caused massive layoffs of government workers and others. It was also coming at the time when the majority of civil society was experiencing serious marginalisation from policymaking and budgetary processes in the country. For instance, the majority of women, youth and poor men were not part of the on-going discussions around structural adjustments policies neither were they being consulted effectively to provide feedback on how they were being impacted negatively by the adoption of these policies (especially in the social sectors).

Developed out of this context, the main objective of the GBI is to strengthen consensus building, collective action and lobbying and advocacy skills for women/gender and human rights oriented groups as regards to gender equity and equality and transformation in policy and budgeting process. The lobbying exercise aims at broadening, in particular, women's and poor men's participation in policy-making and their exposure to management structures of public resources. It also aims at examining the budgeting process in Tanzania from a civil society perspective so as to see how national/local budgets are allocated and the eventual utilization of budgeted resources. A third aim is to gauge the impact this allocation of resources has upon women and other groups such as youth and poor men within Tanzania. Lastly, the exercise aims on laying the foundation of an effective consensus building campaign to influence the public, decision makers, law makers and government officials on the necessity of increasing resources budgeted towards sectors such those impacting women, youths and other disadvantaged members of society.

The second phase of the GBI campaign focuses on providing popular information which could henceforth be utilized to inform the majority of women, men and communities in Tanzania (and beyond) as to which macro-economic issues and policies, budget processes, resource allocation and utilisation effect them the most and compound their social and economic demise. In addition, the focus is drawing attention to the consequences of these imbalances and the resultant implications as regards gender and class inequalities in the distribution of national resources at the community level.

B. Process and Participation of Key Actors

In the understanding that policy advocacy and lobbying initiatives or interventions are most effective when they involve the greatest number of like-minded stakeholders and other civil society sectors, TGNP actors adopted coalition building as the main strategy in the implementation of GBI activities. Coalition building to gender groups represents an effective strategy for lobbying and advocacy work, as the sheer weight of numbers often brings appropriate attention to bear on pertinent issues or concerns and tends to have more effective impact.

Towards this end therefore, the first action of the GBI program in 1997 was to towards strengthening collectivism through the Fern Act coalition. This was done through effective involvement of like-minded NGOs/ gender organisations (more than 15 organisations) in the reflection and planning sessions of the GBI campaign's objectives, approaches and activities. Through a series of reflection/planning sessions (some of which included activists from other countries, e.g. South Africa), several strategic points were identified and given timeframe with a focus of influencing key policies, structures and actors within the government, Parliament, and civil society to adopt gender budgeting concept and processes. The end result of this initial collective process was a planned campaign for the coming 3 years (i.e. 1997-2000).

The following were the main activities planned and implemented:

1. *Preparatory Activities/Planning*

- ⇒ Instituting the program within TGNP and FemAct structures
- ⇒ Identifying strategic point of entries and building working relations with key government actors in selected sectors/institutions
- ⇒ Building a documentation base/ building links with other related initiatives, such as in South Africa, Australia, and the Commonwealth Secretariat

2. *Action-oriented research activities in the selected sectors*

- ⇒ Research was conducted at the national (Ministries) and district level in selected sectors/institutions with the objective of equipping TGNP/FemAct coalition members with relevant data and issues for lobbying and influencing. GBI research activities were facilitated through a Team of Researchers that included gender activists/researchers, academicians and government actors (Planners/Budget Officers). The focussed sectors in the research activities, included the national Planning Commission and the Ministry of Finance, as the key sectors in the planning and budgeting process; Health and Education, as vital social sector service providers; Agriculture as essential to the livelihood of the majority of men and women; and Industry and Commerce, given the significance of market/ trade liberalisation policies in the globalisation process.
- ⇒ Data from the research was collected and analysed with a gender focus in relation to the main direction of policy development, planning and budgeting processes; the main decision making structures and actors e.g. the composition of the budget officers, planners and policy makers, sources of income; and the actual allocation of the resources both to sectors and within and planned and actual output.
- ⇒ Within each sector, data was collected by a team of three researchers, one from the university (economist or sociologist), one from NGOs and one from the government sector involved. Government actors were integrated into the process as researchers, providing access to data that would otherwise be considered confidential and hard to access. The involvement of government officials in the GBI research activities had an impact of enabling the building of "conducive" working relationship between TGNP and technical people working in the respective ministries. The university researchers added the strong quantitative research and academic (economic) background and the NGO researcher contributed issues of gender, participatory techniques and analysis of social impact of policies and related processes.

3. *Feed-backing and dissemination of research findings*

- ⇒ Reports were disseminated to different sectors of society beginning with activist organisations, government departments and external agencies.
- ⇒ Findings were shared through working sessions and public forums with civil society, donors, policy makers and technocrats within the researched areas, and various groups of MPs, specifically women MPs, positive men allies and those active in parliamentary Committees such as the Parliamentary Finance/Budget Committee.

4. *Development of lobbying strategies and tools for Parliamentary and public support*

- ⇒ One such strategy was the publication and dissemination of a popular book called **Budgeting with a Gender Focus**, which outlined the concept of gender budgeting, what budgets are and the inherent gender gaps in macro level policies and the budget in an easy-to-read and understandable format.
- ⇒ Dialogue was made with key policy makers, the legislature and political parties for positive changes in discriminatory and retrogressive and gender blind policies and laws, guide lines and structures and development programmes.

5. *Capacity building on gender as related to macro economic policies and budgets*

- ⇒ Capacity building activities were directed to TGNP/FemAct members, (gender) NGOs and CBOs at the national and local levels to support lobbying efforts on issues of gender and budgeting in the country. Organised activities took the form of: information sharing, reflections/feedback sessions, training sessions and supporting a team of Resource persons on GBI activities
- ⇒ Capacity building efforts activities were also directed to identified allies and key actors (Policy makers, Planners and Budget Officers) in selected government Ministries, and these were supported through organised working sessions, training specifically in areas of gender as it relates to participatory planning and budgeting, as well as providing backstopping services to Planners and Budget Officers when in preparations of their Ministerial budgets.
- ⇒ Capacity building activities on gender budgeting for government actors in the six selected sectors have now become more systematic and institutionalised, as the government decided to use the opportunity available through its retraining of its budget officers on the new requirements of budgeting, i.e. Medium Term Expenditure (MTEF). Gender budgeting became a training requirement of the MTEF process, and TGNP the main resource of the government for this part of training. Through this training more than 200 Budget officers were trained and supported by TGNP.

6. *Development of tools/ instruments for gender budgeting*

- ⇒ The organisation developed alternative budget guide lines for the Planning Commission (1999-2000), as an example of ways in which these guidelines could be gender mainstreamed. **Resulting from this and other processes, the Year 2000-01 Budget guidelines gave the mandate to all Ministry, Department and Agency (MDA) to prepare their budgets with gender mainstreaming objectives in mind.**
- ⇒ A Checklist document (2000) was also developed for the Ministry of Finance to guide budgetary planners and technocrats in the government to mainstream gender into all parts of the process.
- ⇒ Tools were also developed (2000) to guide planners and Budget Officers in the collection of gender-disaggregated data for budgeting purposes.
- ⇒ => The organisation is now working on. ..

7. *Information-sharing and coalition building and networking*

- ⇒ Information has been popularised, through flyers on GBI in Kiswahili, usage of the media and website, and public forums.
- ⇒ TGNP /FemAct members have continued to attend strategic fora to share information on GBI concept, processes and achievements, at the national, regional, and international levels.
- ⇒ Coalition building and networking at all levels has been used to create alliances, contacts and solidarity with other groups and people, promoting collective action in and outside the country.

8. *GBI activities to influence government and donors' structures and processes*

- ⇒ The organisation has been involved or rather sought to influence processes like the Public Expenditure Review (PER), Poverty Reduction Strategy Paper (PRSP) and Tanzania Assistance Strategy (TAS), to adopt more effective gender interpretations. This is done out of the realisation that these and other on going macro economic processes have significant impact on budgetary policies and processes.
- ⇒ The organisation was also invited by the Ministry of Finance/Sida in the recently finalised processes of developing a long-term programme support to the on going activities within the financial sector. Through this process, TGNP in collaboration with a gender consultant from South Africa were able to support the government to build in, a more holistic gender approach to the planned activities related to macro financial policies, revenue, budgets and others.

9. *Documentation of GBI processes*

- *Several processes of documenting GBI activities, achievements and challenges are on going at the organisational/FemAct and at different other levels. The documentation process have been taking different forms: Case Studies, Popular materials, Book forms, Website paging, etc*
- *The organisation is however realising that more effort is needed in documenting the GBI achievements, challenges and impact*

Main Results of GBI

The **methodology** of carrying out the GBI research and disseminating its findings as widely as possible has been as important as the findings themselves. This process has been contributing towards building skills to analyse the social-political dynamics between men and women at all levels and position in society and raising awareness of the national development actors e.g. parliamentarians, Policy makers, planners and Budget Officers, NGOs, Donors and the general public on the deficiencies in democracy and transparency in government policies, programmes formulation, resource allocation (budgeting processes) and implementation processes.

Using participatory and animation techniques, the research identified structural and social constraints (policy wise, and lacking a civil society and gender interpretation) and the (gender) capacity needs by the policy makers, Budget Officers and NGO actors from the civil society. For instance, the planning and budgeting processes were found to be top-down, non-participatory, and having male domination at the policy and decision making and technical level positions, instil biased outlook towards men's and largely excluding women's needs and aspirations for the development agenda. Many policies had the orientation of being people or gender blind when it came to its outcomes. For instance, in education, having equal number of schools for girls and boys is not the only budgetary issue, the quality of education and the quantity by number of male female pupils who are higher achievers at the end of it is also an issue for equitable resource allocation. It is to be noted that resources, planned and allocated by the central government are generated by the very stakeholders of development (men and women) hence the need for their participation in the planning and budgetary processes. The top-down model of budgeting facilitates corruption and leakage at all levels, with decline in transparency and accountability.

Due to the many efforts stressing the importance of mainstreaming gender in budgetary processes and policy-making, the organisation has gained a great deal of access into government structures and strategic decision-making bodies. The organisation has been invited by government and donors to be a part of the Public Expenditure Review (PER) process responsible for ensuring increasing transparency and accountability within the government machinery. In a similar way, TGNP has been taking keen interest in the Tanzania Assistance Strategy (TAS) process, which seeks to co-ordinate government and donor programmes and budgets. TAS has also an overall responsibility for the Poverty Reduction Strategy Paper (PRSP) aimed at poverty reduction in the country. The aim of the organisation in linking up to these processes relates to its interest in enhancing a broader civil society participation and gender sensitivity.

As a convener of GBI processes within the NGOs/FemAct, TGNP has contributed to the strengthening of the NGO coalition, and built capacity in their analytical/conceptual building, advocacy, communications and lobbying skills. There is increased knowledge among the civil society about the link between gender and

economics, structures of power that are reflected in government policymaking, planning and budgeting bodies, as well as what could be done to support progressive processes within these structures.

Even within TGNP, the implementation of GBI activities has been enhancing the capacity of the organisation (members/staff) in various areas, notably in working with the government while guiding its own civil society agenda. For instance, the initial lobbying and capacity building skills employed through the GBI activities, provided for some sort of trust between TGNP and the Ministry of Finance and the Planning Commission. The trust built was useful in allowing TGNP as a gender resource within the government circles. For instance, as mentioned earlier, in year 2000-1 TGNP was commissioned by the Ministry of Finance (with support with Sida) to facilitate skills building on the "hows" of gender budgeting and in providing backstopping services to the respective Budget Officers on the actual integration of gender issues in the budgeting in the six selected pilot sectors. The six earmarked sectors were: Health; Education; Agriculture; Water; Ministry for Community Development, Women Affairs and Children; and Regional Administration and Local Government.

- Backstopping activities within the pilot sectors included:
- Conducting training workshops for budget officers in the sectors;
- Providing backstopping services through organised working sessions with the budget officers during their preparations for the 2000-01 budgets, and
- Developing tools, including a checklist, for assisting mainstreaming processes.

The above activities were recently (early 2001) evaluated by an external consultant for the government, who reported that government actors within the selected sectors and the Ministry of Finance acknowledged that they had benefited from the gender training and backstopping services provided through TGNP/FemAct. The Ministry of Water (MoW), which made the most active use of TGNP's backstopping services, also had the most wide-ranging insertions of a gender perspective into its proposed budget, demonstrating the impact of capacity building efforts, spearheaded by government and facilitated by TGNP. On the whole, the evaluator commented that, "The government's ownership of GBI processes and its technical application was a useful indication for its sustainability."

In the long-term, the Central Ministries of Planning and Finance plan to facilitate all sector Ministries to plan and budget focusing on the analysis of stakeholders needs. The national budgetary guidelines developed by the Ministry of Planning for the development of the year 2001 budget have now specifically given the six pilot sectors the mandate to analyse their budget focusing on men and women as stakeholders with similar and differing needs and aspirations, strengths and weaknesses. The gender mainstreaming exercise raised the awareness and capacities of a variety of budgetary actors concerning the importance of taking men and women and their age differences into account when planning. It is the hope of TGNP that the positive impact of the initiative within the government continues to be recorded and institutionalised in the long run.

Phase II of GBI: Campaign

As explained in the above sections, Phase 1 of the GBI process (1997-2000) focused primarily on the information collection, research and dissemination, and capacity building and influencing for government ownership. The second phase of this process, which started in the year 2001, will continue with data collection and capacity building of the various actors; supporting the government in its gender budgeting activities, but more focus from the organisation will be on advocacy through a civil society *campaign*. Over the year, the campaign processes have proceeded as follows:

1. **Articulation and Planning.** This process has involved a collective decision of more than 30 Gender groups/NGOs regarding the direction, issues, process and messages of the campaign. The following is a summary of the main direction, focus and targets of the GBI for the civil society:

The main focus of the campaign is to enhance the civil society awareness and ownership of the gender budgeting objectives, especially in relation to holding their leaders (at different levels) accountable for resource allocations and expenditure that is progressive and gender sensitive.

In the main, the campaign is to be directed to the following

- **General Public/civil society:** To build capacity of civil society organisations to demand for participation, transformation, gender sensitivity and a planning and monitoring role in resource allocation/expenditure processes.
- **Government:** Advocating for more resources to support the development of the majority of men and women in communities (which sectors?), true representation of men and women in decision-making i.e. people's representation in policy/public decisions made and their involvement at all levels in monitoring the national resource generations and expenditures within government Ministries, district councils and programmes.
- **Regional/International partners:** To enhance coalitions with like-minded civil society partners at the regional and international levels to pressure for transformation of macro-economic frameworks and processes.
- **Donors -** to enhance linkages and share information with Northern gender groups/NGOs and donor allies (progressive Gender Desks) and participate in strategic processes to influence for transformation of relevant macro-economic frameworks, structures and systems, such as HIPC.

In the process of the campaign development, some further reflections on the point of entry were facilitated by TGNP through FemAct coalition. Through this process, a need was identified to find a practical point of entry (public understanding and support) and to link with other entry points to policy change at the local, national, and international levels. The 2001 first quarter meeting of the FemAct Coalition identified the major campaign issue for the year as **the linkages between gender, resources and HIV**. As a follow up to concretise this point of entry, a series of follow-up sessions were held to further conceptualise the campaign. This process of full articulation of the connections of this campaign with resource allocation issues and the GBI campaign has taken longer than expected, due to the complexity of the issues, and is still in process.

2. **Action and Advocacy:** It is important to mention that even during the articulation process, several campaign activities have already been initiated. For instance, throughout the year, TGNP and FemAct have been utilising different opportunities for advocacy to highlight key issues for transformation of macro-economic frameworks and awareness raising on the impact of these policies on local communities. A series of activities have also been undertaken to challenge the HIPC as a debt relief mechanism, as the amount of funds that are returning to Tanzania as a result of debt relief are token compared to the "conditionalities" tied to them. An example of such activity is a demonstration that was organised by TGNP when the Directors of the IMF and World Bank met with African Heads of State in Dar es Salaam in February, 2001. Our goal as civil society was to advocate for total debt cancellation as well as transformation of government and donor development processes that have yet to open up to a larger public debate and input. As further consultations were being made between donor institutions and the government on the debt relief, TGNP/FemAct coalition again expressed publicly the continuing exclusion of civil society participation and input. In this regard, the coalition gathered and put up a press release reaffirming the need for total debt cancellation as well as true consultative processes.

On-going with these advocacy initiatives, TGNP has also worked to engage in government processes as a mechanism for promoting gender and civil society transformation. These include lobbying for space for civil society and gender groups in particular within the PRSP processes, including advocating for alternative monitoring structures of the PRSP, specifically those that focus on resource allocation and data collection. This also includes continued involvement in the Tanzania Assistance Strategy (TAS) and Public Expenditure Review (PER), though at times with selectivity .

3. **Capacity Building and Strengthening of the Coalition Base.** Envisioned for the next phase of the campaign is development of core and task teams for the campaign at the national and local levels will be formed. The core team will comprise key actors within FemAct - for provision of vision and direction to the campaign processes. Task teams will be composed of a broad based of actors and involve organisations with specific specialities for development and implementation of campaign tasks. After the task team actors have been identified, a process of capacity building will be initiated to help ensure that the conceptual framework and issues of the campaign owners are the same.

Lessons/ Challenges for Gender Budgeting

- **Building capacity at various levels is essential.** One of the main obstacles faced by the organisation is the low capacity and interest within civil society on gender, policy and macro-economic issues. In particular, many actors in the women and gender movement in the country are yet link in an effective way, macro-economic issues as gender issues that are vital to address. As a result, at times it is difficult to mobilise many organisations to take advantage of strategic opportunities for advocacy in a short period of time and this means that TGNP/ FemAct can sometimes shoulder too much and often can become a lone voice in lobbying for change within government/donor circle/processes. This low level of capacity of gender groups and NGOs on macro-economic issues has also slowed down the conceptualisation process of the GBI civil society campaign.
- **Meeting expectations of serving as a role model can be difficult.** The work done by TGNP with the Gender Budget Initiative has been exciting for many organisations in the country, region (especially Southern African region) and internationally. While TGNP is eager to serve as a role model for similar processes in other countries and places a strong emphasis on coalition building and networking, the needs of various actors can sometimes spread the capacity of the organisation thin. At times, it makes it difficult for the organisation to strike a balance between the activism focus at the national level and the regional/international demands for gender budgeting experiences. Continuing plans to bring more gender groups/NGO actors into these processes is anticipated to assist in addressing this challenge.
- **Work with government while protecting the civil society agenda.** There has been an on-going debate within TGNP/FemAct about whether or not to continue linking to the government processes, including the on going gender budgeting efforts, PRSP and others, as many view this as being „too close” to the government structures. While this is an important debate for gender groups and civil society actors, TGNP has seen that it is important to continue to, to be influencing government processes, as these are responsible for much of the direction of policy priorities and resources, while of course advocating for more transformative changes in these structures. It however is a challenge and is essential for gender/civil society organisations to draw lessons and skills for engaging with processes as trainers, researchers and advocates/lobbyists while ensuring protection of the civil society/gender agenda.
- **Challenging international macro-economic frameworks is essential.** These frameworks, including Structural Adjustment Programmes and the Poverty Reduction Strategy Paper (PRSP) processes, have from our view, “compromised” the government and meant that there is limited room for it to support development that is gender sensitive and people owned. In this regard, it is vital for Gender groups/NGOs to reflect on the concrete impact of such policies and advocate for more gender progressive and transformation of development strategies and processes in a country such as Tanzania.
- **North-South NGO Partnership is a key strategy:**
In order to facilitate democracy and pro people development in the global/South, partnerships between civil society organisations in the North and South are critical. Northern NGOs have both access to information and opportunities to influence global macro-economic policies and frameworks, particularly those of the World Bank, IMF, and bi-lateral donors. Southern NGOs are more able to assess the relevance of the policies to the local development needs of the people. In this way, forming close ties on an on-going basis can help to ensure that the policies that are developed address the global and local development concerns and are suited to the needs of the country. **BUT**, this partnership ought to be facilitated and supported at different levels. At times this facilitation and support is not forthcoming, especially from the donor partners. In this way, this continues to be a challenge that impacts Gender groups NGOs negatively, especially for those from the South.

Tanzania Gender Networking Programme (TGNP)

P.O. Box 8921 Dar es Salaam, Tanzania. Tel. (255) 22- 2443205/450/286

Fax. (255) 22-243244 E-mail: tgnp@gnp.co.tz Website: <http://www.tgnp.co.tz>