

Caribbean and Pacific Islands

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Gender inequality in the public and private spheres remains significant in the Caribbean and Pacific regions, despite efforts in several countries to experiment with integrating gender equality goals into national policies, programs, and budgets.

Under these gender mainstreaming initiatives—which can be an important tool for achieving inclusive development—governments set out to incorporate considerations of gender into policymaking, rather than having separate policies or programs focused on problems of gender inequality (Budlender and Hewitt 2003). Gender budgeting was advocated as an effective approach to gender mainstreaming in fiscal policies and programs.

This chapter examines gender budgeting initiatives in the Caribbean and the Pacific islands, two regions consisting mainly of small island developing states with varied social and political characteristics, yet shared economic features and environmental challenges. The chapter examines the goals, components, implementation challenges, and results of the gender budgeting initiatives in 24 countries, including 13 Caribbean and 11 Pacific island countries.

Findings suggest that many of the gender budgeting initiatives were not carried beyond the pilot implementation period or, in some countries, gender budgeting activity did not go significantly beyond awareness training. In fact, only Timor-Leste had a significant ongoing gender budgeting initiative among the 24 countries. Renewed emphasis on gender budgeting appears to be emerging, nonetheless, with evidence of several new initiatives due to come on stream in both the Caribbean and the Pacific islands.

The analysis identified the impact of gender budgeting, including its successes, and identified key lessons that can support greater adoption of gender budgeting practices in the two regions:

- *Institutions*: Early institutionalization of gender budgeting was important to the sustainability of the process in Timor-Leste. A Parliamentary Resolution provided gender budgeting an early legal basis. Gender statements accompanying the state budget documents, and later, the budget circulars from the Ministry of Finance, added to this legitimacy.
- *Capacity building*: Capacity building and training for government and civil society are important. This was integral in gender budgeting initiatives in

Timor-Leste, the Marshall Islands, and Samoa. It also raises awareness of the need for gender budgeting in the first place.

- *High-level political support:* Support from key decision-makers and political leaders is, likewise, important, as Timor-Leste shows. This goes beyond finding support from those who typically benefit from capacity building and awareness workshops, such as mid-level staff in government. In Timor-Leste, for example, the prime minister and parliamentarians supported efforts, passing various resolutions. In the Caribbean, Solomon Islands, and Vanuatu, governments did not see high-level support as a priority and there was no significant gender budgeting effort.
- *Alignment with national goals and civil society involvement:* The gender budgeting initiative should be consonant with the country's broader national development goals. This makes the initiative more applicable to a wide range of sectors. Examples include the application to teenage pregnancy in the Marshall Islands and to social sector reform in the Eastern Caribbean countries. For example, an interministerial group can effectively guide and coordinate activities. In the Marshall Islands, Samoa, and Timor-Leste, such a group enabled greater awareness of the shared challenges and concerns different sectors had in addressing gender inequality. And including civil society participants can strengthen such a group, as in the Marshall Islands, improving the range of inputs and ideas available to the committee as well as its legitimacy. Groups with civil society participation can also ensure more local leadership in gender budgeting initiatives, which are often funded by external organizations.
- *Getting started:* One concern is how best to introduce gender budgeting into the planning process and then ultimately into budget implementation. By using gender budgeting to assess various program outcomes, as was done in Timor-Leste, governments can understand the efficacy of other gender equality programs, while also illustrating the utility of gender budgeting. Where no ongoing gender budgeting initiative exists, of course, it can be introduced.
- *Use of regional organizations:* Finally, exploiting existing regional policymaking machinery to support efforts at greater incorporation of gender budgeting may well present advantages. A prominent feature of policymaking and politics in the Caribbean and the Pacific is that leadership comes from regional organizations, and so small, individual countries can better pool resources to address complex problems. The Secretariat of the Pacific Community and the Pacific Islands Forum, for example, perform such functions, with similar organizations in the Caribbean including the Caribbean Community and the Organization of Eastern Caribbean States (OECS). One possibility is that these organizations could adopt their own gender budgeting initiatives to set an example for member countries. At least initially, this may more feasibly overcome the uncertainty and resistance to gender budgeting evident in several countries. In fact, the regional

gender stock-taking exercise being done by the Secretariat of the Pacific Community is one source of regional leadership on gender mainstreaming, and potentially gender budgeting.

REGIONAL OVERVIEWS

The countries of the Caribbean and the Pacific islands (Table 7.1) have made considerable progress on economic development and gender equality over the past two decades. Yet, significant problems remain that require innovative and inclusive approaches to policy, more so within the current challenging fiscal and macroeconomic environment. The Caribbean and Pacific islands are small open economies, dependent on a few dominant industries and highly vulnerable to external shocks. It is therefore important for these small economies to diversify sources of growth and make the best use of all resources.

The Pacific island countries are diverse, with varied cultures and languages, complicating precise definition of the region. Economic activities focus on tourism, services, agriculture, and fishing, and many of the islands rely on foreign aid and remittances to support government expenditures. The Democratic Republic of Timor-Leste stands out for its heavy dependence on its oil-exporting industry.

The Caribbean, likewise, presents diverse history and languages. This chapter focuses on the English-speaking countries with common social, political, and historical contexts.¹ After independence (around the 1960s for most Caribbean countries) the emphasis of economic development policy was on agriculture and services. Today tourism is a major economic sector and source of foreign exchange, along with remittances from residents abroad. In the Caribbean, Trinidad and Tobago is an outlier as the only exporter of fossil fuels.

Countries in both regions also depend on their natural environments for economic survival and are more vulnerable than other regions to natural disasters (Pantin 1995). Briguglio (1995) argues that in small economies domestic markets have limited ability to exploit economies of scale. Other challenges include higher distribution and production costs, difficulty delivering public goods, greater macroeconomic volatility and vulnerability to exogenous shocks, limited financial inclusion, and human resource constraints in the public and private sectors (IMF 2014a).

These issues remain significant and have translated into challenging fiscal environments for most small states. For example, although fiscal deficits narrowed in 2013, they have since begun to increase. And small states have typically had high public debt ratios, which are projected to increase (IMF 2015).

As the fiscal indicators for the Caribbean and Pacific indicate in Table 7.2, global economic challenges have dampened growth prospects for both regions. In addition, while falling oil prices bode well for energy-importing countries, Timor-Leste and Trinidad and Tobago, the regions' main oil exporters, are likely

¹We also examine Dutch-speaking Suriname.

TABLE 7.1.

Development Indicators for Caribbean and Pacific Island Countries									
Country	GDI, time-consistent (2013)	Gini coefficient ¹ (scale 0–100)	Gross secondary enrollment		Labor force participation rate (ages 15–64)		Maternal mortality (per 100,000)	Legislation exists on domestic violence	Married men and women have equal ownership rights to property
			Female-to- male ratio	Female (percent)	Female-to- male ratio	Female (percent)			
Antigua and Barbuda	n.a. ²	n.a.	1.15	112.9	n.a.	n.a.	n.a.	Yes	Yes
Bahamas, The	1.003	n.a.	1.05	95.3	0.91	76.4	80	Yes	Yes
Barbados	1.023	n.a.	1.12	111.0	0.90	76.6	27	Yes	Yes
Belize	0.967	53.26	1.05	86.1	0.61	51.9	28	Yes	Yes
Dominica	n.a.	n.a.	1.07	100.1	n.a.	n.a.	n.a.	Yes	Yes
Grenada	n.a.	n.a.	1.03	109.4	n.a.	n.a.	27	Yes	Yes
Guyana	0.988	44.55	1.15	108.7	0.54	44.7	229	Yes	Yes
Jamaica	0.993	45.46	1.06	91.1	0.83	61.5	89	Yes	Yes
St. Kitts and Nevis	n.a.	n.a.	1.04	96.3	n.a.	n.a.	n.a.	Yes	Yes
St. Lucia	n.a.	42.58	0.99	90.4	0.85	68.7	48	Yes	Yes
St. Vincent and the Grenadines	n.a.	n.a.	0.96	99.0	0.73	60.9	45	Yes	Yes
Suriname	0.976	57.61	1.31	97.1	0.61	44.8	155	Yes	Yes
Trinidad and Tobago	0.988	40.27	1.07	88.5	0.72	59.7	63	Yes	Yes
Caribbean average	0.990	47.29	1.08	98.9	0.75	60.6	79		
Fiji	0.933	42.78	1.11	92.9	0.53	39.3	30	Yes	Yes
Kiribati	n.a.	37.61	1.11	90.9	n.a.	n.a.	90	n.a.	n.a.
Marshall Islands	n.a.	n.a.	1.03	104.4	n.a.	n.a.	n.a.	n.a.	n.a.
Micronesia, Fed. Sts.	n.a.	61.18	1.08	86.7	n.a.	n.a.	100	n.a.	n.a.
Palau	n.a.	n.a.	1.02	99.9	n.a.	n.a.	n.a.	n.a.	n.a.
Samoa	n.a.	42.69	1.11	90.4	0.42	25.5	51	n.a.	n.a.
Solomon Islands	n.a.	46.10	0.94	47.0	0.68	55.5	114	n.a.	n.a.
Timor-Leste	n.a.	31.56	n.a.	n.a.	n.a.	n.a.	215	Yes	Yes
Tonga	0.962	38.10	0.97	102.5	0.74	56.4	124	Yes	No
Tuvalu	n.a.	n.a.	1.10	83.7	n.a.	n.a.	n.a.	n.a.	n.a.
Vanuatu	n.a.	37.18	1.00	59.5	0.77	62.3	78	n.a.	n.a.
Pacific Islands average	0.948	42.15	1.05	85.8	0.63	47.8	100		

Sources: World Bank, World Development Indicators database; World Bank, Women, Business and the Law (2015); Stotsky et al. (2016); and IMF staff estimates.

Note: Values are for 2013 or latest year available. n.a. = not available.

¹A higher Gini coefficient implies more inequality.

TABLE 7.2.

Caribbean and Pacific Islands Fiscal Indicators							
Country	Fiscal Aggregates ¹ (average 2012–15; unless otherwise indicated) ² (percent of GDP)						Public Financial Management
	Total revenue	Total expenditure	Overall ³ balance	Gross ⁴ debt	Education ⁵ expenditure	Health ⁶ expenditure	Public Expenditure and Financial Accountability (PEFA), overall score ⁷
Antigua and Barbuda	20.1	24.3	-4.2	95.7	2.6 ⁸	3.7	n.a.
Bahamas, The	17.8	23.3	-5.5	57.8	n.a. ⁹	3.4	n.a.
Barbados	36.1	45.1	-8.9	95.1	5.7	4.7	n.a.
Belize	27.7	31.0	-3.3	75.4	6.4	3.7	n.a.
Dominica	30.1	33.7	-3.5	77.7	n.a.	3.8	n.a.
Grenada	22.9	27.7	-4.8	100.9	n.a.	2.9	2.3
Guyana	26.9	30.4	-3.4	54.7	3.5	3.7	n.a.
Jamaica	26.8	28.0	-1.2	136.2	6.3	3.1	2.4
St. Kitts and Nevis	40.1	32.0	8.0	95.9	4.2 ⁸	2.2	n.a.
St. Lucia	25.9	31.6	-5.7	78.7	4.3	3.7	n.a.
St. Vincent and the Grenadines	26.7	30.0	-3.3	75.2	5.1	4.3	n.a.
Suriname	24.2	31.3	-7.1	31.3	n.a.	3.1	n.a.
Trinidad and Tobago	32.3	36.3	-3.9	42.6	n.a.	2.8	2.8
Caribbean average	27.5	31.1	-3.6	78.3	5.2	3.5	2.5
Fiji	27.3	29.9	-2.6	48.8	4.3	2.8	n.a.
Kiribati	99.3	94.3	5.0	10.1	n.a.	8.4	n.a.
Marshall Islands	53.1	52.8	0.2	31.9	n.a.	14.3	n.a.
Micronesia, Fed. Sts.	66.0	61.5	4.5	26.8	n.a.	12.2	n.a.
Palau	42.5	39.9	2.6	n.a.	n.a.	6.6	n.a.
Samoa	34.5	39.4	-4.9	53.9	5.1 ⁸	5.5	2.0
Solomon Islands	50.1	47.7	2.4	14.2	10.0	4.9	2.1
Timor-Leste	57.8	30.0	27.8	n.a.	10.0	1.0	2.2
Tonga	28.1	28.9	-0.7	n.a.	n.a.	3.8	2.6
Tuvalu	114.7	89.8	24.9	47.6	n.a.	15.8	n.a.
Vanuatu	24.4	25.0	-0.6	20.6	5.0	3.6	2.6
Pacific Islands average	54.3	49.0	5.3	31.7	7.3	7.2	2.3

Sources: IMF, World Economic Outlook (WEO); World Bank, World Development Indicators (WDI); and IMF staff calculations.

¹All figures except for health and education expenditure are drawn from the latest WEO publication, and the concept of government corresponds to that in the WEO. Please see the WEO for further details. Health and education expenditure are drawn from the WDI and correspond to the general government concept.

²The figures are based on the average over the number of years in this period for which data were available.

³Corresponds to the concept of total revenue minus total expenditure.

⁴Gross debt does not net out holdings of debt by other entities of the government.

⁵The figures for education expenditure are based on 2010–13 averages or the number of years for which data are available in this period. The 2013 data are the latest available.

⁶The figures for health expenditure are based on 2011–14 averages or the number of years for which data are available in this period. The 2014 data are the latest available.

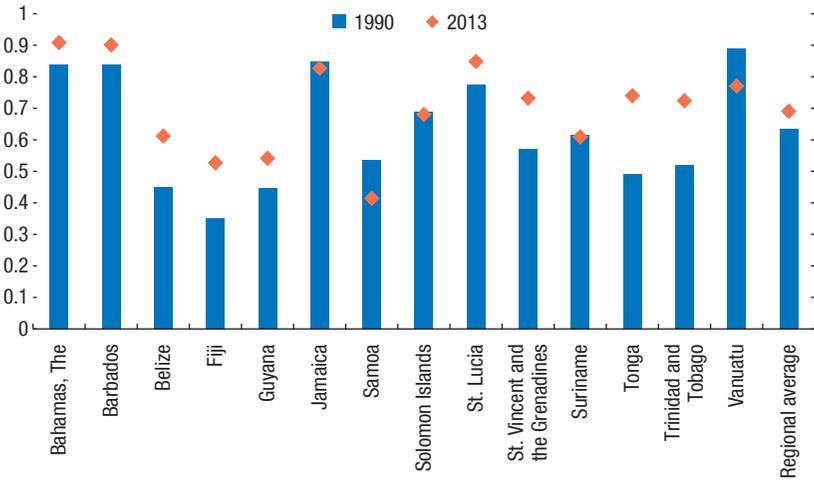
⁷PEFA is a performance monitoring framework used to assess the public financial management systems in developing countries. It is an initiative jointly supported by the World Bank, IMF, European Commission, and other development and government institutions. The framework consists of 28 indicators with each indicator scored on a scale from A (highest) to D (lowest).

PEFA scores reported above are an average of the 28 indicators and convert the four ordinal PEFA scores (A,B,C,D) to numerical scores (4,3,2,1) with “+” score given 0.5 point. A higher PEFA score implies stronger administration of public finance. On a global basis, the lowest score is 1.1 and the highest score is 3.6. Please see <https://www.pefa.org/> for further details.

⁸The figures reflect the value of latest year available since data were not available for the 2010–13 period: Antigua & Barbuda (2009), St. Kitts & Nevis (2007), Samoa (2008).

⁹Data are not available.

Figure 7.1. Labor Force Participation Rate, Ages 15–64
(Female-to-male ratio)



Sources: World Bank, World Development Indicators database; and IMF staff estimates.

to feel fiscal and economic pressure from lower oil revenues. The same is true for commodity-intensive countries in the Caribbean, which face lower prices for gold and aluminum. These commodity shocks emphasize the importance of diversifying the economies of the natural resource producers.

One major development challenge across the Pacific island countries is ineffective governance, including the delivery of public services.² Some argue that this has hurt economic growth rates, particularly in comparison to those in the Caribbean (Prasad 2008). Perhaps a key constraint on economic growth among the Pacific island countries is their remoteness. That is, the cost of transportation between countries in the region, limited labor mobility, and the large distance between markets can all severely limit economic growth. In fact, countries in the Pacific are the most remote in the world; more so than those in the Caribbean (World Bank 2009).

These development challenges are related to gender inequality in both regions. In keeping with global trends, female labor force participation is lower than that for males, although the gap has fallen (Figure 7.1). That said, even with greater female labor force participation, the gender wage gap remains a problem across the Pacific island countries (Pacific Islands Forum Secretariat 2013) and is particularly acute among men and women with low skill levels and education (World Bank 2012). Similarly, in the Caribbean men earn more than women on average,

²Table 7.2 notes the typically low PEFA scores of the regions. PEFA is a tool for assessing the status of public financial management.

ranging from \$22,779 for men and \$14,850 for women in Barbados, to \$8,882 (men) and \$5,338 (women) in Jamaica (Hausman, Tyson, and Zahidi 2013).

Gender inequality is also sizable in political representation. The Pacific island countries have some of the lowest levels of female representation in the world; several countries have no female representation in their national legislatures (Pacific Islands Forum Secretariat 2013). Timor-Leste is an exception. In the Caribbean, however, recent trends suggest that political representation of women is approaching the so-called critical mass marker of 30 percent, albeit at the local government level (Reddock 2004).

With the support of civil society groups, governments have responded to these challenges in several ways. All countries have agreed to international conventions such as Convention for the Elimination of All Forms of Discrimination Against Women (CEDAW), and have passed legislation to promote gender equality. Within the past six years, several Pacific island governments have passed revised or new legislation to prevent domestic violence and protect its victims.

Other areas in which Pacific island governments have responded include raising the minimum wage, which would primarily benefit women in low-income jobs, and introducing paid maternity leave. The Solomon Islands introduced a bill in 2014 requiring political parties to ensure women make up at least 10 percent of their candidates (Secretariat of the Pacific Community 2015a).

More broadly, however, few Pacific island countries have a national gender policy, which would set out government objectives. Some of the exceptions include Fiji (2014), Samoa (2010), Tonga (revised 2014), Tuvalu (revised 2014), and Vanuatu (2014) (Secretariat of the Pacific Community 2015a).

In the Caribbean, countries have improved legislation related to gender equality, including laws to recognize the inheritance and other rights of women in unions other than marriage (common law unions) and laws to address domestic violence. A smaller set of countries—Belize, the British Virgin Islands, Cayman Islands, Dominica, and Jamaica—has also drafted national gender policies (Hosein and Parpart 2014). Some of the identified policy priorities include those on gender-based violence, leadership and political representation, employee rights, and access to health and reproductive services. Figure 7.2 illustrates accomplishments in maternal mortality over the past two decades.

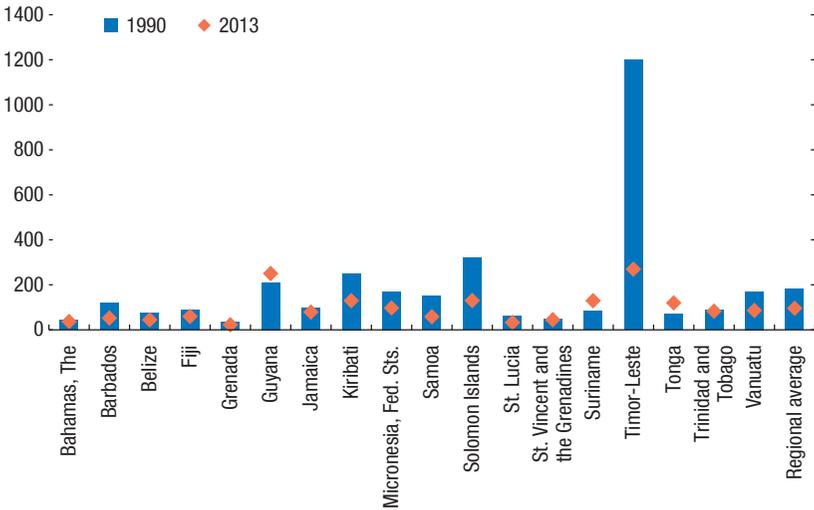
In summary, the countries of the Caribbean and Pacific islands have advanced economic development and gender equality considerably over the last two decades, but only a few governments have attempted some form of gender budgeting. The following sections examine examples of such initiatives.

GENDER BUDGETING COUNTRY EXPERIENCES: TIMOR-LESTE

Overview

Since gaining independence in 2002, Timor-Leste has taken significant steps toward gender budgeting. Despite a long history of political turmoil, the

Figure 7.2. Maternal Mortality Ratio
(Modeled estimate, per 100,000 live births)



Sources: World Bank, World Development Indicators database; and IMF staff estimates.

country has made remarkable progress in building its economy (IMF 2014b). The economy has grown rapidly, averaging almost 9 percent a year since 2010 (World Bank 2015), primarily due to large reserves of oil and gas in the Timor Sea. As the second most oil-dependent nation in the world, the country earns most of its revenue from oil (Costa, Sharp, and Elson 2009).

This extreme dependence on oil, however, may hamper the economy going forward if the country does not diversify its economic base (Arbulu 2012). However, despite the growth in GDP, unemployment remains high and poverty persistent. In 2014, gross national income per capita (in purchasing power parity) was \$5,680. Among a population of about 1.2 million in 2014, an estimated 50 percent was living below the national poverty line,³ with rural poverty particularly severe (World Bank 2015).

As a newly democratic state, Timor-Leste has made significant efforts to establish sound governance structures and strengthen its institutional frameworks. Although successive governments have made strong commitments to good governance and upholding rights, much more remains to be done. Transparency International ranked Timor-Leste 133rd out of 175 countries on the Corruption Perceptions Index (2014). The country also received low marks for transparency, with a rank of 36 for budget openness in 2012. Weak

³This was a 2007 estimate. Poverty assessments are approximate given the lack of recent data.

institutional capacity of the government has been attributed to a lack of skilled bureaucrats and inadequate administrative procedures (Costa, Sharp, and Elson 2009).

A legacy of gender inequality tends to be pervasive in conflict-affected states (Holmes and Slater 2014). In Timor-Leste, women are disadvantaged in many areas—education, employment, and health being among the most serious. In a vicious cycle, this leads to other problems such as vulnerability to gender-based violence and human trafficking. Studies report that some 38 percent of women have experienced physical violence during their adult lives (SEPI 2014). The Timorese government has taken some affirmative steps to correct the wide gender inequalities; however, significant disparities remain. For example, women's literacy rates are consistently lower than men's, especially in rural areas (Costa, Sharp and Elson 2009). While gross school enrollments are low for boys and girls, female enrollment rates decline significantly at the secondary and tertiary levels.

In employment, the female labor force participation rate of 26.9 percent in 2010 was less than half that of males (56.2 percent) (Secretary of State for Vocational Training and Employment 2010). Furthermore, women were typically employed in lower occupational ranks, receiving lower salaries and fewer benefits and opportunities to advance professionally (Costa, Sharp, and Elson 2009). In health, limited facilities and skilled birth attendants cause the maternal mortality rate to be among the highest in the world at between 140 and 500 per 100,000 live births (World Health Organization 2013 estimate).

Nevertheless, Timor-Leste's commitment to promoting gender equality has made some positive achievements over the years. The country has one of the highest shares of female parliamentarians in the world, with 38 percent of seats in the National Parliament in the July 2012 elections won by women.⁴ The government also enacted a law and a national action plan against domestic violence to combat pervasive gender-based violence. Still, it has been observed that women's strong representation in parliament does not necessarily translate into strong influence in decision-making, as voting is done along hierarchical and party lines (Costa, Sharp, and Elson 2009). Additionally, institutional problems that lead to weak implementation of laws require greater effort to effectively implement the Law Against Domestic Violence (SEPI 2014). Given the stark gender disparities, proponents of an economic growth model that advances the well-being of everyone advocate gender budgeting as one strategy that can reduce inequality and accelerate development in Timor-Leste.

⁴This achievement was facilitated by legislating a quota system in parliamentary elections requiring at least one woman for every three candidates on political party candidate lists (SEPI 2014). With 38 percent of parliament currently female, Timor-Leste has achieved its Millennium Development Goals target of 35 percent women in parliament. At the local government level, however, females are still underrepresented. In 2010, there was only one female governor in a subdistrict and none in the districts. Furthermore, only 3 percent were village chiefs (JICA 2011).

BACKGROUND TO GENDER BUDGETING IN TIMOR-LESTE

As a critical part of nation building, the government placed considerable emphasis on women's rights and gender equality. These principles were incorporated into the constitution and embedded in the National Development Plan for 2002–07 and, more recently, into the Strategic Development Plan 2011–30. The government also signed on to several international conventions advocating women's rights and equality. In 2003, it ratified CEDAW, which requires that the government be accountable for its actions in addressing gender issues across the full spectrum of social, economic, and environmental sectors. The country also signed the Beijing Declaration and Platform for Action and the Millennium Development Goals (MDGs).

As such, Timor-Leste adopted gender mainstreaming as the primary approach to promoting equality between men and women. Gender budgeting was embraced as a key strategy to integrating gender into the policy process as a standard procedure. The government adopted gender budgeting in July 2009, which involved ensuring that commitments for the promotion of gender equality translated into action in annual plans and budgets of the government and state-funded institutions (SEPI 2014).

In the initial implementation, the gender budgeting initiatives focused on fiscal issues related to rights-based goals such as women's equality, women's economic empowerment, poverty reduction, eliminating gender-based violence, enhancing women's position in decision-making, education, and health. Among the MDGs, gender budgeting was regarded as an essential tool in achieving goals 1, 3, and 5: reducing poverty, empowering women, and improving maternal health (UN Women n.d.).

The gender mainstreaming flag areas of education, health, justice, agriculture, and finance served as the initial focus sectors for gender budgeting. However, directives from the government urged all ministries and state secretariats to take gender equality considerations into account during the budgeting process. To date, the emphasis of gender budgeting in Timor-Leste has been on spending outlined in the annual action plan that informs the budget of each ministry. A tax or revenue dimension has not yet been developed. Some progress has been made in compiling appropriate sex-disaggregated data to better inform gender-sensitive policies.

SPECIFIC GENDER BUDGETING INITIATIVES

Timor-Leste has engaged in a range of gender budgeting activities, largely supported by donor partners. Initial efforts concerned establishing an institutional framework for undertaking gender budgeting; raising awareness of the importance of integrating gender into policies, programs, and budgets; and improv-

ing the technical capacity to conduct gender budgeting analyses by providing training opportunities for government officials and members of civil society organizations. Most recently, the focus has been on incorporating gender issues into the Annual Action Plans of ministries and state institutions, aiming to translate planning into programming and budgets.

Legal Basis for Gender Budgeting

In Timor-Leste, the constitution is the first legal basis supporting gender budgeting. According to the national women's machinery, "the Constitution provides the mandate for action on gender issues across all sectors" (SEPI 2014). It calls not only for equality between women and men in all areas of family, political, economic, social, and cultural life (Article 17), but also for nondiscrimination on various grounds, including gender (Article 16) (Government of Timor-Leste 2002).

Additionally, the government adopted three resolutions to ensure gender perspectives were integrated into operations in governing institutions. First, in 2002, the government established the Office of the Advisor on the Promotion of Equality to advance women's affairs and lead gender mainstreaming as the main national women's machinery. Its mandate was significantly expanded in 2008 with the establishment of the Secretary of State for the Promotion of Equality (SEPI). Decree-Law No. 16/2008 instituted SEPI as a legal agency and as a central government body. In this new capacity, it was given greater responsibility to promote and monitor the introduction of gender budgeting among government agencies.

Second, the government introduced gender budgeting in July 2009 through a parliamentary resolution (No. 28/II). This called on all parliamentary committees to use and promote gender budgeting instruments and methods, and established a parliamentary process, assigning roles to government, nongovernment organizations, and donors. Parliament again endorsed gender budgeting in Parliamentary Resolution No. 12/2010 on the preparation of a budget, in May 2010.

Third, in August 2011 the Gender Working Groups Resolution No. 27/2011 was adopted to enjoin all line ministries and state secretariats to constitute gender working groups in districts, consisting of senior officials responsible for decision-making and budget implementation. The resolution established national gender working groups at the state and district levels.

In addition, specific sections on gender equality known as gender statements were included in the 2008, 2009, and 2010 budget documents. Costa, Sharp, and Austen (2009) argue that these gender statements provided the pillar for the gender budgeting institutional framework. Even though the government discontinued including gender statements in the budget documents after 2010, the Ministry of Finance continues to issue a budget circular requiring ministries and secretaries of state to integrate gender considerations into their annual action

plans and budgets. The 2015 State Budget highlighted the following gender-related considerations:

The programme of the fifth government commits gender equality and nutrition for children as the MDG objective which needs to be given attention from all. Therefore each Line Ministry and State Institution needs to ‘discriminate’ in their submission, to allocate budget for gender activities and programmes for children. Gender activities need discrimination following the guidelines of the Secretary of State; for activities and programmes related to children, it is the relevant ministries’ responsibility. To achieve this compromise, it is requested to the relevant ministries and agencies to identify the strategic areas and ensure budget allocations are adequate to reach the objectives set (Timor-Leste Ministry of Finance 2015).

The state budget circular was supported by the prime minister’s guidelines for annual planning, which also required that a gender perspective and equal opportunities be considered (Budlender 2015). More detailed guidelines and sectoral checklists, prepared by the national women’s machinery, were intended to assist government agencies in complying. Box 7.1 presents an example of the gender checklist for the justice sector.

A form of “gender statement” was included in the 2016 budget, highlighting Timor-Leste’s progress in gender equality to date and reaffirming the government’s commitment to reform:

Timor-Leste has achieved all targets under Goal 3 ‘Promote Gender Equality and Empower Women.’ It has surpassed the targets set for ratios of girls to boys in primary, presecondary and secondary school, setting an example for gender equity in education, an achievement few other developing countries can claim. The Government is putting in place important measures to encourage the role of women in the private sector, and subject to meeting certain standards, businesses operated by women are given preferential treatment in Government procurement. Between 2010 and 2014, 1,600 businesses run by women have been registered with the Institute for Business Support (IADE) and received training and assistance on planning, preparing credit proposals and improved market linkages. The Government is committed to further reforms . . . to improve gender equality. Key activities include: running an advocacy campaign to increase awareness of gender responsive laws and policies and establishing a district female congress (Timor-Leste Ministry of Finance 2016, 39).

Institutionalization of Gender Budgeting

The integration of gender in Annual Action Plans is the centerpiece of the gender budgeting framework in Timor-Leste (UN Women 2015a), as the central document in the budget process of all ministries and state institutions. These plans must be approved by the Ministry of Finance and the recently established Planning, Monitoring and Evaluation Unit (Decree Law, June 2015). Specific to gender budgeting, the expanded role of the national women’s machinery requires it to review the Annual Action Plans of government institutions and provide guidelines for inclusion of gender issues.

Box 7.1. Gender Mainstreaming and Gender-Responsive Budgeting: Draft Checklist for Gender-Sensitive Planning and Budgeting of State Annual Action Plans and Budgeting

Gender Mainstreaming and Gender-Responsive Budgeting in the Justice Sector

1. Has a gender analysis of the sector been conducted to understand women and men's different needs, problems, in the sector?
2. Have the international agreements been taken into account before planning (MDG, Beijing Platform for action, and CEDAW Concluding observations Dili Comprimisu, and National Parliament Resolution on GRB, fifth government programmer's gender commitments)? (If you don't have gender analysis.)
3. Check sex- disaggregated data at all levels for outcome and output, targets and indicators.
4. Have you considered including activities to review policies, laws, or implement laws towards the promotion of gender equality?
5. Have you considered including activities to increase access to justice for women, such as legal aid services, dissemination of laws in local languages and legal literacy programmes.
6. Have you considered including specific activities for the implementation of the Law Against Domestic Violence (LADV)? Have you considered allocating a budget for the implementation of LADV, and its National Action Plan?
7. Have you considered including activities to mainstream gender in your Ministry: for instance to conduct an institutional gender assessment of the Ministry, to develop a gender policy, to develop guidelines for planning and budgeting, gender mainstreaming, gender responsive budgeting.
8. Have you considered conducting a long term capacity building programme for the staff on women's human rights, CEDAW, gender, gender responsive planning, budgeting, and gender sensitive legal drafting?
9. Have you considered to include activities in order to mainstream gender in the curriculum of the Legal training center
10. Have you considered developing feedback mechanisms from women to monitor participation and impact on a regular basis and include it as part of your plan?
11. Could you please check how much budget your Ministry has allocated for gender related activities?

Source: UN Women Timor-Leste (n.d.)

Institutionalizing gender budgeting through Annual Action Plans has had some success. The number of ministries and state institutions that included provisions and actions related to gender equality in their Annual Action Plans doubled from 14 to 28 between 2013 and 2014. Moreover, the quality of gender equality measures and actions incorporated into the Annual Action Plans improved noticeably (UN Women 2015a). Examples of gender-related sections in the plans include:

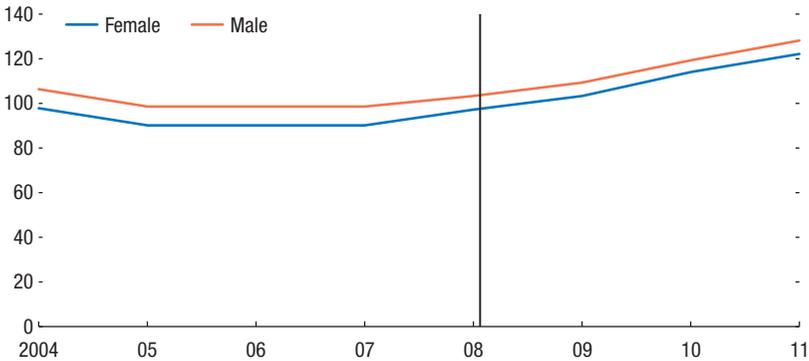
- The Secretary of State for Vocational Training and Employment promoted gender equality in its programs. Plans included the identification of young people (male and female) for training in producing and sewing local products for the hospitality industry. There were also plans to develop a national skills strategy from a gender perspective.
- The Ministry of Tourism, Commerce and Industry aimed to create new industrial enterprises and training opportunities for women.
- The Ministry of Defense and Security outlined workshops to raise awareness about mechanisms for defending rights, including the issue of women's access to justice and legal assistance. It emphasized gender balance in the attendees.
- The Ministry of Education focused on increasing access for girls and women to all education levels. Interventions included gender-awareness training, implementing gender-friendly curriculum and teaching practices, and designing a scholarship system for women to participate in technical and higher education.
- Several ministries included specific gender targets for recruitment and training of staff, for example, the Ministry of Foreign Affairs and Ministry of Tourism.
- The Secretary of State for Youth and Sport systematically targeted 50 percent girls and women in their activities.

In the early phases of introducing gender budgeting in Timor-Leste, the focus was on specific sectors. These included the Ministries of Finance, Health, Education, Agriculture, Justice, and Social Services. The education and agricultural ministries have made particularly significant progress in integrating gender considerations into their policy making and programming framework.

In 2008 the Ministry of Education set up a gender unit and assigned three gender working groups. External consultants assessed how government expenditures could be better targeted to meet the educational needs of girls and boys and reduce gender gaps in school attendance. The analysis involved comparing the population shares of rural and urban boys and girls, their school attendance, and budgetary data to identify the share of educational expenditure on different groups of children (Austen and others 2013). The study found that government spending on rural girls at presecondary and secondary school levels was particularly low in relation to their population share.

The findings from this gender analysis helped to inform the Ministry of Education in developing a social inclusion policy to address the gender gaps. The policy provides an implementation framework for existing and future initiatives that promote the right to education for marginalized groups, including girls, children in rural areas, and children with a disability (ADB 2014a). Data on primary school enrollments show an increase in gross enrollment rates since the mid-2000s, with a slight narrowing of the gap between males and females since 2008, when gender budgeting was first implemented (Figure 7.3).

Figure 7.3. Timor-Leste: Gross Primary Enrollment¹
(Percent)



Sources: World Bank, World Development Indicators database; and IMF staff estimates.

Note: The vertical line indicates the start of gender budgeting in the education sector in 2008.

¹In some countries, the female or male gross enrollment rate is over 100 percent, suggesting that there are grade repeaters or late or early enrollments. For more information, please refer to: <https://datahelpdesk.worldbank.org/knowledgebase/articles/114955-how-can-gross-school-enrollment-ratios-be-over-100>.

The Ministry of Agriculture and Fisheries was highlighted in the Beijing+20 Review of Timor-Leste for its significant progress in integrating gender considerations into its policymaking framework. Specifically, it was noted that the ministry had:

- Developed a gender policy;
- Appointed gender working groups at the national and district levels to implement gender-specific strategies and women-focused activities;
- Revised its National Policy of Food and Nutrition strategy to ensure that intervention programs included gender considerations; and
- Assigned extension agents at the district level, with special attention to women.

Complementing the progress, in July 2009 the Inter-Ministerial Commission for Rural Development was formed. Its responsibilities involved the monitoring of sex-disaggregated data and gender equity issues within the Strategic Framework for Rural Development 2010–2020 (SEPI 2014). Prior to this initiative, in 2008 the national women's machinery began a Women's Economic Empowerment Program for rural women. The program, part of the MDG Fund Joint Project, provided training and cash transfers to support women's groups in rural areas to start and grow small businesses. The program transferred approximately \$350,000 between 2008 and 2011. Monitoring reports show that some 77 percent of the groups of women receiving assistance have continued to operate their businesses (SEPI 2014).

Addressing gender-based violence is another important area that provides evidence of progress in gender budgeting in Timor-Leste. In 2010 the Law Against Domestic Violence (No. 7/2010) was proclaimed and in 2012 the National Action Plan of Gender-Based Violence was adopted. This plan represented the country's first multisectoral approach to addressing gender-based violence, comprising the education, social services, justice, security, and health sectors (ADB 2014a). Gender budgeting analysis was used to cost the National Action Plan, with more than \$7 million budgeted by key ministries during 2012–14.

Support for Gender Budgeting

Successive governments have been keen to voice support for gender equality in Timor-Leste. This has assisted efforts toward wide-scale integration of gender equality considerations in national policy under gender mainstreaming and gender budgeting. However, actual implementation of gender-sensitive policies is heavily donor-driven, with initiatives often coming to a halt when external funding ceases. Nevertheless, the fact that the government remains receptive to ideas of intentionally incorporating gender allows international donor agencies, such as UN Women, to continue to engage public officials and civil society in trying to bring about sustainable implementation of gender budgeting. This section summarizes support for gender budgeting in Timor-Leste from various sources.

Executive/Political Level

The government's commitment to gender budgeting as a part of its gender mainstreaming strategy was outlined in the gender statements in the 2008, 2009, and 2010 budget documents. Costa, Sharp, and Austen (2009) argue that these statements provided the pillar for the institutional framework for gender budgeting in Timor-Leste. The 2008 Gender Statement indicated that the government, through the national women's machinery, would develop an integrated "Whole of State Policy for Women in 2008" and that the government intended to initiate a gender approach to the formulation of the second National Development Plan and for the 2009 budget (Timor-Leste Ministry of Finance 2008). These sentiments were further reinforced in the 2009 and 2010 budget documents within the gender and culture statement. The 2010 statement indicated progress made, highlighting that the government had intensified its gender approach to the formulation of Ministry Annual Action Plans.

The National Women's Machinery

The secretary of state for the support and socio-economical promotion of women (SEM) (formerly, the secretary of state for the promotion of equality) leads efforts to integrate a gender approach in policymaking and, by extension, gender budgeting. According to the five-year strategic plan (2012–17) of SEM, the office advocates for gender-responsive policies and laws; makes institutions gender sensitive through gender mainstreaming in policies, programs, processes

and budgets; raises gender awareness among stakeholders and the general public to raise public support for gender equality promotion; and empowers women through cash transfers to women's groups (ADB 2014a).

More specifically, it channels gender budgeting functions through gender working groups established in government ministries and agencies at the national and district levels. These have been credited with increasing inclusion of gender priorities in Ministerial Annual Action Plans and budgets (SEPI 2014).

In 2012 SEM's ability to advocate for gender budgeting was strengthened by its inclusion on the Budget Review Committee. Being on the committee allowed SEM to offer a gender perspective on the budget process at the highest level and gave more weight to SEM's monitoring and interventions. In May 2014 SEM and the Ministry of Finance received capacity support in the form of in-house gender experts funded by international donors. These gender advisers offered real-time support in response to requests and have been credited with helping SEM influence the integration of gender into the Annual Action Plan process (UN Women 2015a).

The National Parliament

The National Parliament also plays an important role in gender budgeting. The push for a legal basis for gender budgeting in Timor-Leste in 2009 came from the National Parliament, led mainly by the Women's Caucus (Costa, Sharp, and Elson 2009). The formation of a caucus of female members of parliament to provide a united front on gender equality issues has been hailed as a major achievement for Timorese democracy (ADB 2014a).

An important resource available to all members of parliament is the Center for Capacity Building and Information on Gender Equality, established to assist national parliamentarians to incorporate gender equality issues in their work. The center provides information services and training for elected officials and their staff to help them understand and address gender-related issues in policymaking. In 2010 the Group of Women Parliamentarians, working with civil society and SEM, secured additional funding for the Ministry of Agriculture's gender budget.

International Donors

The introduction of gender budgeting in Timor-Leste has benefited greatly from development partners that have worked extensively with government and civil society to promote awareness of gender mainstreaming and to build capacity in gender budgeting analysis. Donor agencies, including the Asian Development Bank (ADB), United Nations Development Programme, UN Women, United Nations Capital Development Fund, World Bank, and the governments of Australia, Ireland, New Zealand, Norway, Spain, Sweden, and the European Union, have offered development assistance.

Between 2008 and 2012, the MDG-Fund Joint Program was particularly successful in promoting gender budgeting in Timor-Leste. Among its broad goals, the program "supported government efforts to protect women from violence and

economic hardship and ensure their equal access to justice by assisting in the formulation of legislation and gender-sensitive budgeting, building capacity to prevent human trafficking, and improving services for victims of violence” (MDG Fund n.d.). In addition to supporting the adoption of a gender budgeting framework, the Joint Program was instrumental in bringing about the Law Against Domestic Violence (passed in June 2010). The Joint Program also supported the development of the National Action Plans on Gender-Based Violence and Human Trafficking.

Since 2014 the government of Norway has been instrumental in reviving gender budgeting efforts through funding for the program Institutional Strengthening for Gender Equality and Women’s Empowerment in Timor-Leste.

Civil Society

Timor-Leste’s very active civil society has played a key role in advocating for gender budgeting. Formal mechanisms have been established at the ministerial level and within the national women’s machinery for inclusion of the views of civil society. In addition, various international development agencies, such as UN Women, United Nations Population Fund, and United Nations Children’s Fund (UNICEF), often partner with the civil society groups to mobilize resources and assist with capacity building. In August 2010 women’s rights organizations started a campaign to lobby government to ensure all future budgets were gender responsive. More recently, the Norway Project funded the Gender Responsive Budget Working Group of the Civil Society, which for four years has undertaken an independent gender review of the Annual Action Plans and state budget and submitted its recommendations to parliament (UN Women 2015a).

Consultative Process

Participatory national consultations and extensive media campaigns helped the government raise awareness of gender issues in policymaking and get widespread support for gender budgeting. The participation of civil society groups, and more formally meetings of the National Women’s Congress, considered the concerns of women and girls and other marginalized groups. Held approximately every four years, the congress allows the gender and development community to engage with Timorese women and establish priorities.⁵

To commemorate International Women’s Day on March 8, 2008, meanwhile, various government and parliamentary stakeholders and civil society organizations signed an agreement reiterating their commitment to work together to implement gender budgeting. This Dili Commitment pledged action to introduce gender budgeting, eliminate violence against women and girls, promote

⁵At each meeting, the National Women’s Congress develops a Platform for Action, which could be used as a monitoring tool for the implementation of gender equality, but which has not received much attention from the government (UN Women Timor-Leste 2015).

equal access to land and resources, and develop gender-sensitive policies in key areas such as health and education (ADB 2014a).

ASSESSMENT OF GENDER BUDGETING

A 2011 assessment of gender budgeting commissioned by the national women's machinery found that "much progress had been made by SEPI and partners to establish mechanisms for gender responsive budgeting, raise awareness of its value, and train stakeholders in what is involved" (SEPI 2014). However, the report identified more than 15 challenges and gaps in capacity related to the structure of the budget system, confusion about roles and responsibilities, a lack of coordination, and the limited resources and capacity of organizations involved. In the budget system, the structure of the state budget and the ability to transfer allocations between different line items made it difficult to track whether spending was gender-related.

In the same vein, while significant work has incorporated gender into Annual Action Plans, more needs to be done to move from planning to budgeting. Annual Action Plans represent a potentially strategic entry point for gender budgeting, as noted, but the current format does not allow in-depth analysis. It is more of a narrative statement, without corresponding description of activities or budget allocations (UN Women 2015a). Plans are under way to change the format of the budget from line-based to performance-based, whereby planned activities can be better linked to budgets and spending.

In this regard, the new Decree Law of June 2015 could have positive implications for gender budgeting. Under the law, each ministry and secretary of state is required to have the programs and activities outlined in its Annual Action Plans reviewed by the Ministry of Finance and the newly established Unit of Planning, Monitoring and Evaluation. The Ministry of Finance will verify the coherence between those plans, the budget, and the tangible results of proposed programs and activities.

Another challenge preventing the effective implementation of gender budgeting in Timor-Leste is the need for quality data and information (SEPI 2014). Limited availability of sex-disaggregated data makes it nearly impossible to track the implementation of programs mentioned in the Annual Action Plans. Recently, UN Women negotiated with the General Directorate of Statistics to enhance the 2015 National Census by obtaining accurate data that consider women's realities (UN Women 2015a).

LESSONS LEARNED

Timor-Leste is the only country covered here that has sustained engagement with gender budgeting, albeit with varying success. Given its history of conflict

and relatively recent independence, gender budgeting has focused on substantive areas of relevance to the country. Among the lessons learned:

- High-level political support was instrumental to the sustainability of gender budgeting efforts. Each successive administration integrated gender equity considerations into its national programs. In addition, successive prime ministers (Xanana Gusmã then Rui Maria de Araújo) were vocal champions of gender equality. The National Parliament, which pushed through the legal framework to legitimize gender budgeting, also provided strong support.
- There was consonance with national development goals. The gender budgeting efforts, while funded by international donors, were consistent with national development policies (the National Development Plan 2002–07, and the Strategic Development Plan 2011–30), which gave the government a feeling of ownership of the program.
- The early institutionalization of gender budgeting was important to sustainability. The 2009 Parliamentary Resolution gave an early legal basis to gender budgeting. The gender statements that accompanied the state budget documents, and later, the budget circulars from the Ministry of Finance, added to this legitimacy.
- The institutionalization of gender budgeting through the Annual Action Plans, arguably the centerpiece of the gender budgeting framework, presented a strategic approach to operationalizing gender budgeting in line ministries and state secretariats. The more recent gender budgeting initiatives have been a part of broader programs with multiple objectives in gender equality and women's development. This allows the application of gender budgeting across multiple sectors, increasing its influence. Notable achievements include the Ministry of Education's National Social Inclusion Policy, the National Policy on Gender-Based Violence, and the Ministry of Agriculture's National Policy of Food and Nutrition.

The Caribbean

Overview

Most Caribbean countries did not have what could be judged a well-developed gender budgeting initiative. However, all signed on to the Convention for the Elimination of All Forms of Discrimination Against Women and other international conventions requiring them to account for gender issues in national policies and programming. This stipulation was mainly fulfilled by governments incorporating provisions for gender under social sector expenditure and programming.

To this extent, several initiatives targeted at gender equality were implemented, including the establishment of Gender Bureaus and increased social protection spending. To be sure, mainstreaming gender into national policy has not been a priority for most countries, and in some the general sentiment has been

that the budget was already gender neutral and significant steps to address gender issues were being taken through social programs. Nevertheless, several Caribbean countries have entertained the idea of gender budgeting as a tool for monitoring program spending and have engaged in various instances of training in gender budgeting—mostly driven by international donor support. The impact of this training, however, is not clear as the initiatives were not sustained. Recently, donor partners have renewed pushing to have gender mainstreamed into national policies, programs, and budgets, with Eastern Caribbean countries, Trinidad and Tobago, and Suriname announcing new gender budgeting initiatives.

History of Gender Budgeting Initiatives

Barbados launched the earliest gender budget initiative in the Caribbean, in the late 1990s, as part of the first Commonwealth Secretariat Gender Budget Initiative. The pilot, a training seminar for government officials from different ministries, required participating ministries to conduct gender-responsive analyses of their budgets. This included examining expenditure on targeted programs, expenditure on government employees, and general expenditures (Dalrymple 1999). Without further political support, however, the initiative did not progress beyond the pilot. Some 14 years later the official report on Beijing+20 noted that gender budgeting remained an important need in the government (Government of Barbados 2014).

St. Kitts and Nevis also received support from the Commonwealth Secretariat in the late 1990s to pilot a gender budget exercise through the Bureau of Women's Affairs. The initiative was meant to target the Ministries of Finance and Agriculture. However, in this case the initiative did not take place due to insufficient support among public sector officials, who felt that much work was already being done to promote gender equality (CDB 2014). For example, it was noted that gender provisions were incorporated into social sector spending disbursed as cash grants. Nonetheless, the Commonwealth Secretariat did manage to implement a Gender Management System program that was credited with bringing about a six-fold increase in funding for the gender development program of the Ministry of Community and Social Development and Gender Affairs (Buddender 2001).

Since 2013 a new wave of gender budgeting activity has emerged in the Caribbean. In Trinidad and Tobago, the government announced in its 2014 Budget Statement that it would develop guidelines to institutionalize gender budgeting in government ministries as part of a gender mainstreaming strategy (Government of Trinidad and Tobago 2014a). The Ministry of Gender, Youth and Child Development led the initiative in collaboration with the Commonwealth Secretariat.

Gender budgeting activities included a three-day capacity building workshop for public policy and planning officials in March 2012, the preparation of a gender budgeting toolkit tailored to Trinidad and Tobago, and the formulation of a three-year action plan for institutionalizing gender budgeting in all government

agencies and ministries. The plan, completed in August 2014, was to start in fiscal year 2014/15 (Government of Trinidad and Tobago 2014b). However, nothing was actually implemented, no follow-up occurred, and no further mention of gender or gender budgeting was made in the 2015 or 2016 budget statements. Ministerial changes during that period and a subsequent change of government in 2015 could help explain this. It remains to be seen whether the new administration will take up the action plan.

Several new and potentially promising, initiatives are currently under way in the Eastern Caribbean. In May 2015 UN Women, UNICEF, and the Organization of Eastern Caribbean States (OECS) Commission organized a regional workshop on child and gender responsive budgeting for budget directors and senior public officers of the social transformation ministries from the Eastern Caribbean states and the British overseas territories (UN Women 2015b).⁶ The workshop is part of a joint initiative among UN Women, the OECS Commission, and government counterparts for 2014–16 to integrate child and gender sensitivity into ongoing social protection reform (UNICEF 2015). The workshop aimed to increase the knowledge of relevant policymakers and social development practitioners to ensure the financing of child- and gender-related policies and programs in social protection. Other planned activities under the joint initiative included the development of a gender- and child-responsive budgeting manual, tailored to the Eastern Caribbean Area and Caribbean Overseas Territories.

Another promising initiative is under way in St. Vincent and the Grenadines, which has been taking steps to mainstream gender into macroeconomic planning. According to the Beijing+20 report, the Ministry of Finance in partnership with the Eastern Caribbean Economic Management Program has embarked on a gender mainstreaming initiative to integrate gender into macroeconomic planning. The activities have included the collection of sex-disaggregated economic data, review of relevant legislation, and training in gender budgeting (Government of St. Vincent and the Grenadines 2014). In addition to the work done by Economic Management Program, the Gender Affairs Division worked with the Ministry of Finance to develop guidelines and indicators for gender budgeting.

Social Protection Programs in the Caribbean

While attempts to incorporate gender budgeting into national planning are still nascent in the Caribbean, addressing gender equality issues through social sector policies is a common theme throughout the region. For example, Barbados, Jamaica, and Trinidad and Tobago have developed social protection and social safety net programs well, benefiting poor women and children. The social sector therefore provides a strategic entry point for advancing gender budgeting in a more systematic way in the Caribbean.

⁶Member countries of the OECS are Antigua and Barbuda, Dominica, Grenada, St. Kitts and Nevis, St. Lucia, and St. Vincent and the Grenadines.

As noted above, UN Women and UNICEF implemented several initiatives with the aim of linking gender budgeting approaches to social protection. In 2014 a gender-sensitive Social Protection Policy Framework was adopted in Grenada and a gender-sensitive Social Development Assistance Act in St. Kitts and Nevis (UN Women 2015c). In St. Lucia, several initiatives were undertaken, including a gender-sensitive National Social Protection Policy and Strategic Action Plan, as well as a Budget and Fiscal Space Analysis for Social Protection.

In Guyana, several social sector programs aim to improve gender equality and women's empowerment. Guyana's 2014 Beijing+20 Report synthesizes the general sentiment toward gender mainstreaming: "In general terms, budgetary allocations in Guyana are targeted towards gender equality and women's empowerment across all sectors. Government is of the view that budgetary support for social sector spending on water, health, education, housing and human services, etc., targeted at the poor and vulnerable, benefit women" (Government of Guyana 2014). Within the context of Guyana's Poverty Reduction Strategy Program, budgetary allocations for the social sector—health, education, water, housing, labor, human services and social security, Amerindian affairs—assumed 34.5 percent of the 2014 national budget. Specific social protection programs targeted at females include the public assistance program, the universal old-age pension, the single-parent assistance program, the Women of Worth project,⁷ the universal school uniform program, and the school feeding program.

In addition, the government has stressed access to affordable shelter as a priority, helping low-income households acquire property. One aspect of this has been the implementation of a program to regularize squatter settlements. It has been noted that women in particular have benefited from this program, acquiring land under concessional terms. The Ministry of Housing reported in 2014 that in the previous five years 50 percent of all people who applied and were allocated government low-income house lots were women (Government of Guyana 2014). The program has been hailed as a major achievement.

National Gender Policies in the Caribbean

A more recent trend in the Caribbean to incorporate gender-based considerations into public administration processes is the development of national gender policies. As noted earlier, Belize, the British Virgin Islands, the Cayman Islands, Dominica, and Jamaica now have such policies (Hosein and Parpart 2014).

A more recent example is the National Policy on Gender Equality of Jamaica approved in 2011 and developed through a broad consultative process over seven years. The policy aims to reduce all forms of gender-based discrimination; strengthen institutional mechanisms to mainstream gender in all social, political,

⁷The government of Guyana established the Women of Worth project in 2010 in partnership with a locally owned commercial bank. The project aimed to facilitate women's participation in the economy by providing small business loans as start-up capital to single mothers (Government of Guyana 2014).

and economic institutions; and to improve the public sector's capacity to monitor gender-responsive plans and programs (Bureau of Women's Affairs 2010). To achieve these goals, the policy calls for specific strategies, including gender-responsive budgeting.

Policies such as these highlight how gender budgeting can ultimately support the goals of gender equality and indeed wider social and economic development. The challenge is to find specific and practical entry points for the incorporation of gender budgeting in planning. One often ignored area is taxation policy.

Gender Equality and Tax Policies in the Caribbean

The impact of tax regimes on males and females can differ, and, in the Caribbean, this is more likely to occur through indirect taxation. For example, in 2015 St. Kitts and Nevis removed a 17 percent value-added tax (VAT) on all food, medical, and funeral expenses. This provision was made in part to ease the tax burden of female-headed households (Government of St. Kitts 2015). Alternatively, in Trinidad and Tobago a one-year Baby Care Grant was introduced in 2014 to assist mothers; it provided 500 Trinidadian dollars a month to qualifying parents (Government of Trinidad and Tobago 2014a). In both cases, while the differential impacts by sex may be expected, no current analysis offers evidence of the impacts of these types of initiatives.

While the same can be said of the gender implications of Caribbean tax policies generally, Christie and Thakur (2015) provide an alternative example. Their research examined the case of Jamaica and the discourse on taxation reform in that country. One proposal for reform was to reduce the number of goods exempted under the current VAT regime. However, because of the different patterns of consumption between female-headed and male-headed households, the former was more likely to face a greater tax burden because of this proposal (Christie and Thakur 2015).

Similar findings of differential impacts of the tax system on male- and female-headed households for a cross-section of developed and developing countries were reported by Grown and Valodia (2010). Such studies can help assess the potential for tax reform to be revenue neutral and help achieve gender equitable fiscal policy goals. Indeed, similar studies as that of Jamaica could be of significant benefit to other Caribbean nations. These studies would underline tax reform as a potential entry point for a broader gender budgeting program.

Potential for Gender Budgeting in the Caribbean

Another issue of significance in the Caribbean is what has been labeled "male marginalization" (see Miller 1986). This refers to the state where the socialization of young males, in particular, can make them eschew the formal education system as a means for securing a career and livelihood. This leaves them less interested in and less prepared for school than girls. This is most evident in the secondary education system (see Table 7.1, where the gross secondary enrollment [female-to-male ratio] is particularly high for the Caribbean countries). In fact,

the contrast is greater at the tertiary level, where females outnumber males by 2 to 1 in some cases. However, this presents an opportunity for gender budgeting, as education budgets and programs could benefit from an assessment of the differential impacts on boys and girls, particularly where improving the educational participation and outcomes of boys is important. This could also highlight that the issue of “gender” does not refer to women only, a common misconception in the region.

Drawing on the experiences of other middle-income countries can also identify other opportunities for introducing gender budgeting in the Caribbean. For example, Bolivia’s and Ecuador’s initial experiences in gender budgeting were at the municipal level before going national (Fragoso and Enriquez 2016). A similar approach could be taken in the Caribbean. Gender budgeting at this level may be more politically feasible, while also providing the opportunity to showcase its benefits, even on a small scale.

Finally, it is important to recognize that at least one part of the Caribbean has a tradition of formulating and implementing regional fiscal policy, as is the case for the Eastern Caribbean through the OECS and its related institutions. This has led to coordination around fiscal policy such as a harmonized approach to the application of VAT. Such forms of regional cooperation present an opportunity to benefit from gender budgeting at the subregional and regional levels.

CONCLUSIONS

This chapter has reviewed the common development challenges most of the 24 countries across the Caribbean and Pacific islands face as small island developing states, as well as their differences in socioeconomic trends, political histories, and remoteness.

Both regions share experiences in gender inequality. This includes a wage gap favoring men, limited political representation by women in most countries, gender-based violence, and patriarchal norms that continue to drive these inequalities. At the same time, nongovernmental organizations, in particular, have been able to lobby and work with governments to enact policies and laws that can help reduce such inequalities.

Our analysis also pointed to how the regions have embraced and implemented gender budgeting in different ways. In the Pacific islands, the Asian Development Bank led a major effort in the early 2000s. More recently, a broad range of organizations has supported the initiatives in Timor-Leste, which we identified as having the most advanced gender budgeting initiative among all countries reviewed here. In the Caribbean, there have been no significant gender budgeting initiatives to date. At best, various pilots and training in gender budgeting have taken place at different periods. These have coincided with major thrusts by international development partners to promote gender budgeting in the region. The earliest was led by the Commonwealth Secretariat in the late 1990s, and the more recent by UN Women.

Gender budgeting initiatives that are no longer ongoing in Fiji, Marshall Islands, and Samoa can best be described as pilot projects. How can we explain this pattern? One possibility is the relationship between gender budgeting initiatives and international development interventions. Unlike other initiatives to promote gender equality, such as legislation on domestic violence or national gender policies, which were often initiated by local women's movements, gender budgeting initiatives in the Caribbean and Pacific were often funded and initiated by international actors. That does not mean they had no local support; instead they often resulted from a partnership with an international development agency and a local nongovernmental organization (again a relationship typical of international development). An example of this was the gender budgeting pilot in the Marshall Islands, where the ADB and its consultants partnered with the local nongovernment organization, Women United Together Marshall Islands, and the government to implement the pilot.

For other countries with gender-budgeting-related experience, this primarily took the form of capacity-building projects that included objectives to raise awareness about gender budgeting in selected countries. A final set of countries had no real gender budgeting experience of note, but did have several experiences in promoting gender equality, including the adoption of national gender policies, passage of legislation, and other programs.

Among the major lessons learned, Timor-Leste's experience warrants particular attention. Early institutionalization of gender budgeting there was important to the sustainability of the process. For example, the 2009 Parliamentary Resolution gave an early legal basis to gender budgeting while the use of Annual Action Plans allowed line ministries to incorporate gender budgeting into their operations. In addition, the Timor-Leste experience illustrated the benefit of applying gender budgeting across ministries and, in so doing, highlighted its utility for sectors outside of government agencies specifically responsible for gender. Other important factors that can support gender budgeting include high-level political support, adequate capacity building and training, and alignment with the country's larger national development goals.

Our analysis also highlighted the barriers to further implementation of gender budgeting. A government official in the Caribbean noted that significant work was already being done to support women (CDB 2014). Similarly, according to a nongovernment organization, the minister of finance in Fiji suggested that one challenge was to get more lawmakers to appreciate the importance of gender budgeting (femLINKpacific 2013).

As with most gender equality issues, many decision-makers need to be convinced that a problem exists in the first place. This is compounded because some policies have implicit but no obvious differential impacts on men and women. Yet this is precisely the kind of role and data that gender budgeting can provide.

While very few examples exist of current gender budgeting initiatives in the countries reviewed here, gender budgeting still has a role in these countries. No single ideal gender budgeting strategy is applicable to all countries (Chakraborty 2010), more so given the diverse needs of the Caribbean and Pacific countries.

Ultimately, arriving at a strategy for integrating gender budgeting into ordinary and routine public administration processes will require a combination of strategies mentioned throughout this report ranging from links to national development plans, realistic time expectations for achieving results, capacity building, leadership, and regional coordination.

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ANNEX 7.1. GENDER BUDGETING IN TIMOR-LESTE DATA TEMPLATE

ANNEX 7.1.

Gender Budgeting in Timor-Leste Data Template	
	Timor-Leste
ORIGINS	
Does the government have a gender budgeting initiative?	Yes
If yes, start year	2009
If any, end year	
Supported by international organizations or bilateral aid agencies	Yes
Tied to MDGs or national development plan or gender equality strategy	Yes
SELECTED COMPONENTS OF FISCAL POLICY	
Focus on spending	Yes
Spending focus on key human development (education, health)	Yes
Spending focus on physical infrastructure (transport, water, electricity, energy)	No
Spending focus on justice and security (violence against women, judicial assistance)	Yes
Spending focus on jobs, entrepreneurship, wages, etc.	No
Structural reforms in spending (subsidies, transfers, incentive or distributional objectives)	Yes
Focus on revenue	No
Personal income tax focus	No
Other tax focus, including general or selective sales and trade	No
INDICATORS TO PLACE GENDER BUDGETING IN THE FISCAL PROCESS	
Broad statement of goals of minister of finance	Yes
Gender budgeting statement in budget documentation	Yes
Gender budgeting circular or related to instruct the bureaucracy	Yes
Gender budgeting in planning and programming	Yes
Gender budgeting outcome report or audit	No
Explicit reporting on gender equality spending	No
LEGAL BASIS	
Gender budgeting has constitutional standing	No
Gender budgeting is incorporated in organic budget or other finance laws	No
ROLE OF GOVERNMENT	
Ministry of Finance lead entity	No
Other ministries play consequential role, and which	Yes; the secretary of state for the support and socio-economical promotion of women
Subnational government	Yes
ROLE OF CIVIL SOCIETY	
Significant encouragement or participation of civil society	Yes

ANNEX 7.2. OTHER PACIFIC ISLAND COUNTRIES

Marshall Islands

Overview

The Republic of the Marshall Islands (RMI) is a lower-middle-income country with limited natural resources and an economy primarily driven by the public sector and social services. The economy is dependent on aid and a key donor is the United States through the US Compact of Free Association. Through this agreement, which lasts until 2023, the country receives annual funding to support the domestic budget (SPC 2012).

The Marshallese have a matrilineal culture, which implies that land was typically inherited via the mother. However, the transition to a more modern culture has meant that this practice is not as widespread as before (SPC 2012). The RMI has one of the highest teenage pregnancy rates among the Pacific island countries. Other gender disparities include a lack of access to adequate health care; a 2002 household expenditure survey found that 80 percent of women experienced this problem (SPC 2012). In addition, men still dominate decision-making spaces such as the national parliament, with RMI having one of the lowest rates of female representation globally (Sharp and others 2009).

Other significant disparities are observable in education. For example, although girls and boys are almost equally likely to attend primary school, girls are less likely to remain enrolled in secondary and tertiary level institutions (Sharp and others 2009). This in turn has an impact on employment levels, with female unemployment at 37 percent compared to 28 percent for males in 2007 (SPC 2012). These problems are compounded by a gender wage gap, particularly in the non-agricultural sector (JICA 2009). Another major problem is violence against women. The Secretariat of the Pacific Community has cited studies indicating that 22 percent of all women have experienced physical violence in the past 12 months (SPC 2012).

Similar to the experiences of other countries in the region, civil society groups have been active in addressing these challenges. Women United Together in Marshall Islands, established in the 1980s, is one such organization. It is an umbrella group for women's groups in the country and works closely with the government and its underresourced Gender in Development Unit within the Ministry of Internal Affairs. Women United Together in Marshall Islands has been one of the main organizations working toward greater gender equality in the country and helped advocate for the passage of the Domestic Violence Prevention and Protection Act 2011 in compliance with CEDAW, the Convention for the Elimination of All Forms of Discrimination Against Women (Government of Australia 2014).

Other initiatives that promote gender equality include amendments to the Child Abuse and Neglect Act (in 2004); the Births, Deaths and Marriages Act (in 2002); and the Education Act (RMI 2014). Perhaps more important was the National Gender Policy, which was endorsed by the government in February

2015. The policy outlines major goals and targets for achieving gender equality across a range of sectors. This includes leadership and political participation, economic participation, health care, education, and training. It also seeks to reduce gender-based violence and create more gender-responsive programs within the government (RMI 2014).

Gender Budgeting

Of relevance here is a pilot project on gender-responsive budgeting implemented between 2002 and 2003. The project was funded by the Asian Development Bank (ADB) as part of a regional program (Youth and Gender Sensitive Public Expenditure Management in the Pacific) to support gender and development in the Pacific island countries. There were three main goals of the project: promote transparency and accountability on issues of gender and youth, raise awareness about gender/youth issues and budget impacts, and develop policies and budgets that are gender/youth sensitive (Sharp and Dev 2004).

The approach used was to divide implementation into two stages. The first stage, led by the ADB and its consultants, started with a gender-based assessment of the RMI and involved a series of training and awareness-raising workshops on the issues of gender budgeting. A total of three workshops were held, the first two part of the first phase of the project. The first workshop was for government agencies and focused on helping participants to understand gender issues in the RMI and the potential direct and indirect gender-based impacts of programs run by their ministries and agencies. This was complemented by the second workshop that was for nongovernmental organization participants. More specifically, these workshops included activities that showed how budgetary processes can impact social and economic outcomes for men and women. In so doing, the aim was to make participants better able to advocate for gender-responsive budgets.

The second stage of the project was designed by the Marshallese stakeholders. This was led by a steering committee comprised of representatives of the Ministry of Finance, a representative of what is now referred to as the Gender in Development Unit, and a representative from Women United Together in Marshall Islands (Sharp and Dev 2004). The committee decided to focus on the increased awareness and capacity around gender budgeting on a single issue that was perceived to be important across the country. They decided to develop a program on teenage pregnancy with the aim of changing public budgets to better respond to this issue. As noted earlier, this is a significant problem in the country.

Impacts of Gender Budgeting

Ultimately, however, this project did not lead to any further significant changes in the government's budgetary or planning process (Sharp and others 2009). There were several reasons for this, such as competition in the administrative ownership of the teenage pregnancy program, and a lack of commitment by the Ministry of Finance (which was complicated by a change in administration during the project) (Sharp and Dev 2004). Nevertheless, the project raised

awareness about gender budgeting using the challenge of teenage pregnancy as an entry point. It also promoted the use of statistical analysis to better understand gender issues, and it pointed to the need for interagency cooperation in pursuing gender-related challenges (Sharp and Dev 2004).

Sharp and Dev (2004) identified several lessons that we can learn from this pilot project. For example, they note that while one year may be sufficient to raise awareness and train people on gender budgeting, it is not enough time to change the budgeting process. Other factors include an appreciation of the political context; in this case the context included understanding the bureaucratic relationships between the Ministry of Finance and other ministries and the need for inclusion of local nongovernmental organizations, which was crucial to the limited success of the project.

Fiji

Overview

Fiji is a small island nation with a diverse population and one of the largest island economies in the Pacific region. The gross national income per capita in 2013 was higher than the average of \$3,460 among Pacific island small states for that period (Government of Fiji 2014a). As with most developing countries, the government's initial emphasis on gender issues was to focus on service delivery for women. This eventually evolved into an additional focus on policy with the establishment in 2009 of the Department of Women in the Ministry of Women, Social Welfare and Poverty Alleviation (Government of Fiji 2014a). In that year the government also updated its existing National Women's Plan of Action to cover the years 2010–19. The main priority areas of the Women's Plan of Action 2010–19 are: Formal Sector Employment and Livelihood, Equal Participation in Decision-Making, Elimination of Violence Against Women and Children, Access to Basic Services, and Women and the Law (Government of Fiji 2009).

Despite this focus, gender-based violence remains prevalent, with one 2011 survey suggesting as much as 64 percent of women in an intimate relationship reporting that they experienced some form of physical or sexual violence (ADB 2014b). Although women and girls have higher enrollment rates in education than males, the female (15 years and older) labor force participation rate (34 percent) in 2010 was much lower than that of males (65 percent) (ADB 2014b). It should be noted that there are also differences in the experiences of rural and urban women in terms of domestic violence, poverty, and access to justice (ADB 2014b).

In reviewing the progress and challenges related to women's development, the government has consistently and publicly stated its intent and support for improving the status of women in Fiji (Government of Fiji 2014a). Perhaps the most recent expression of this intent was the 2014 National Gender Policy for the Republic of Fiji, with a stated goal of removing all forms of gender inequality in the country in keeping with its commitment to the Convention on the Elimination of Discrimination against Women (CEDAW), among others (Government of Fiji 2014b). Of note, the policy calls for the government to:

Introduce Gender Responsive Budgeting and gender audits in the planning, implementation, evaluation and monitoring of the national budgetary process and promote gender responsive budgeting by development practitioners to ensure optimum benefits to rural and urban women.

Gender Budgeting

Fiji was the first Pacific island country to engage in gender budgeting, albeit in a short-lived project sponsored by the Commonwealth Secretariat in 1999. That project emerged as part of the civil society-generated momentum around the first Fiji Women Plan of Action (1999–2008) but was disrupted before any major activity began, in part because of the military coup in 2000. Indeed, while Fiji has been recognized as having a vibrant women's movement, much of its influence has been attenuated by the four coups since 1997 and the associated periods of authoritarian rule (George 2012). Throughout this period, any progress made in implementing a sustained gender budgeting initiative has been limited (Costa and Sharp 2011).

One example is a gender audit that was conducted on the Ministry of Agriculture, Sugar and Land Resettlement, which was part of a larger project to support the Fijian government's effort to implement the Women Plan of Action (1999–2008). The project was implemented between 2001 and 2003 and supported by the ADB (Agriteam Canada 2015).

The specific goals of the audit were to (1) assess the differential impacts on males and females of the Ministry of Agriculture, Sugar and Land Resettlement's policies and programs, and (2) identify ways to make the work of the ministry more gender responsive and more collaborative with that of the Ministry for Women, Social Welfare and Poverty Alleviation (Government of Fiji 2003). Within this project, gender budgeting was indirectly addressed in terms of overall planning and budgeting within the agricultural sector.

The audit also included a review of the policy process that led to the formulation of the country's food security policy. As with most developing countries, food security is a major concern for the Ministry of Agriculture, Sugar and Land Resettlement, and this emphasis highlights several ways in which a gender analysis is important. For example, one challenge is accurately assessing the economic contribution of women's (unpaid) work in households that engage in subsistence farming—where such contributions are often viewed as synonymous with their role as mother and wife and therefore not viewed as economically productive (Government of Fiji 2003).

Some of the key areas of focus of the audit included the main goals and objectives of the Ministry of Agriculture, Sugar and Land Resettlement, human resources and distribution of staff in key functions, and the policy development process. The audit also looked at how gender considerations could be better incorporated into the eight key performance areas of the ministry's corporate plan at the time. These were executive services (that is, monitoring and evaluation, and human resource development), crop extension, livestock extension, drainage/

irrigation, center of excellence, land-resource planning, sugar sector, and quarantine.

In looking at the policy development process, the audit noted that planning in general followed a top-down model, although there were attempts to introduce more participatory approaches in planning. In general, the budget process starts in March each year and continues until the budget is presented in parliament in November. The Ministry of Agriculture, Sugar and Land Resettlement and other ministries do not assess the differential impacts of budgetary allocations on males and females.

One key performance area that the audit covered, and is of particular relevance when considering how to introduce gender budgeting, is monitoring and evaluation. Here the audit highlighted the lack of sex-disaggregated data within the ministry (and indeed the government). This attenuates any effort at gender-based monitoring and evaluation and gender budgeting specifically. In fact, it recommended that the ministry should ensure that all of its data collection and research activities be modified to address this problem.

The audit went further by also pointing to some of the structural problems that inhibit gender mainstreaming in the ministry. This included a lack of political will as well as awareness and appreciation of the importance of including gender analyses in the planning process. This applied to both senior and other staff in the Ministry of Agriculture, Sugar and Land Resettlement. In addition to raising awareness the audit pointed to the need for specific skills and training on gender-responsive planning, which could also include gender budgeting.

Impact of Gender Budgeting

In sum, while the gender audit of the Ministry of Agriculture, Sugar and Land Resettlement did not result in subsequent implementation of gender budgeting, it did make important recommendations for raising awareness of gender mainstreaming, providing training, and modifying data collection strategies. It also highlighted several ways in which gender-responsive planning could be better incorporated into the work of the ministry. The ADB's own assessment noted that getting the endorsement and commitment of senior managers throughout the audit process could have ensured that it would have had a greater long-term impact (ADB 2014c).

Perhaps one positive outcome was that following the audit, the Ministry of Finance included the question on differential impacts of budgetary allocations on males and females in its 2003 Expenditure Proposal. This meant that each line ministry was then required to conduct this kind of assessment (Government of Fiji 2003). However, as Sharp (2005) observed, this inclusion was not accompanied by any provision of incentives and/or penalties to encourage reporting and action. Thus, it is unclear what impact (if any) it had. It is also unclear if any of the recommendations of the audit itself were implemented.

More than a decade later, gender budgeting does not yet exist in Fiji. As one nongovernmental organization reported in 2012, the minister of finance

suggested that one of the reasons for this is the lack of awareness among policy-makers about the nature and importance of gender budgeting. Furthermore, the minister suggested that other problems included the lack of sex-disaggregated data and existing religious and cultural norms in the society (femLINKpacific 2013). There is currently, as noted earlier, an emphasis on budgetary allocations toward gender initiatives such as the work of the Ministry for Women, Social Welfare and Poverty Alleviation (Government of Fiji 2015). As femLINKpacific argues, achieving gender equality requires more than these types of budgetary allocations; instead allocations should be directed toward changing policies and structures (femLINKpacific 2013). This is, in effect, the rationale behind the as yet unheeded call for gender budgeting within the National Gender Policy and the Women's Plan of Action 2010–19. Unfortunately, a recent (2015) budget address made no reference to gender budgeting, but instead highlighted increased allocations to support the work of the current Women's Plan of Action (Government of Fiji 2015).

Samoa

Overview

Samoa is a Polynesian Pacific country located northeast of Fiji and west of the Cook Islands. It is a small island developing state with a population of 191,800. Samoa was the first Pacific island country to achieve independence in 1962. Since then it has maintained a stable parliamentary democracy (DFAT 2015). Transparency International ranks it 50th among 175 countries in terms of corruption in the public sector, with a score of 52/100. Samoa has a small, open economy that is heavily based on subsistence agriculture, remittances, and foreign aid (DFAT 2015). The economy is highly vulnerable to natural disasters and other external shocks. For example, the economy was hurt by the 2008 global recession, the 2009 tsunami, and, more recently, Cyclone Evan in December 2012 (DFAT 2015). Gross national income per capita was \$5,600, on a purchasing power parity basis, in 2014.

The Samoan economy is dominated by subsistence farming, which comprises approximately 67 percent of the adult workforce. In the formal economy, the government is the largest employer, and women account for close to 53 percent of the total public service (UN Women n.d.). Samoa is among the better performers among the Pacific countries on women's participation in the political arena, with women holding 6 percent of seats in the assembly (World Bank 2015).

In March 2012 the government amended the constitution to reserve 10 percent of seats in parliament for women. This was a temporary special measure designed to alleviate historical bias at the national political level (Secretariat of the Pacific Community 2015b). Since then, a 2013 amendment to the Samoan constitution required at least five female members of parliament (10 percent), and if this is not the result from the election, the number of seats in parliament is to be increased. This was invoked in the recent March 2016 elections (Pacific Women in Politics 2016).

Samoa is a signatory to a range of international and regional commitments that make gender equality a priority.⁸ Nevertheless, the Secretariat for the Pacific Community notes, “while significant progress has been witnessed in many areas, challenges remain where women continue to be under-represented in governance and development processes, and experience discrimination and diminished opportunity in virtually all development sectors” (Secretariat of the Pacific Community 2015b, 5).

Gender Budgeting in Samoa

Samoa was one of the first Pacific island countries to engage in gender budgeting, but it has made limited progress since the initial initiative. In 2002–03 Samoa (along with the Marshall Islands and Fiji) participated in a pilot initiative sponsored by the ADB. The main aim of the initiative was to “improve Public Expenditure Management by integrating a gender and youth perspective into governments’ budget policies” (ADB n.d.). At the time, Samoa had undergone extensive public sector reforms, including output budgeting and strategic planning (Costa and Sharp 2011). The ADB pilot initiative was designed to incorporate gender budgeting within the context of the ongoing policy and budget reforms, using the national budget as a natural entry point (Sharp 2004). In Samoa, at the time, a new youth policy had just been developed, but its budget was not yet allocated nor activities prioritized. The youth policy thus served as an appropriate testing ground for gender budgeting. The pilot initiative took a multidimensional perspective, focusing on the nexus between youth and gender, while drawing on the frameworks, tools, and strategies of gender budgeting (Costa and Sharp 2011). Chakraborty (2010, 18) notes that “such disaggregation of budgetary policies, not only by sex but also by age groups, has been the significant contribution of the Samoan experiment.”

To spearhead the pilot in Samoa, an international consulting firm was engaged (ADB n.d.). The team adopted a strong participatory approach, and consulted government and civil society, including NGOs. The consultant also organized an intensive in-country training and mentoring program in budgeting. One successful aspect of the pilot project was to have several ministries working together in a cross-ministry coordinating team, headed by a senior Ministry of Finance official (Costa and Sharp 2011). Sharp (2004) writes that “the opportunities provided by the pilot projects to network and collaborate among ministries led to an appreciation that all ministries have a stake in promoting better gender outcomes” (Sharp 2004, 14). However, while this was a significant accomplishment of the pilot initiative, failure to develop the institutional mechanisms to embed such processes into the budgetary and policy decision-making processes meant that the efforts were not sustained after the pilot.

⁸Samoa has signed CEDAW, the 1995 United Nations Beijing Platform for Action, the Commonwealth Plan of Action for Gender Equality, the Revised Pacific Platform on Advancement of Women and Gender Equality, and the Millennium Development Goals (SPC 2015b).

Impacts of Gender Budgeting in Samoa

A final evaluation rates the pilot initiative as successful in terms of the progress toward the initial goal of raising awareness and contributing to greater transparency of gender and youth issues in policies and budgets (ADB n.d.). However, Sharp (2004) makes a more critical assessment, acknowledging that a 15-month pilot initiative was not long enough to achieve significant and sustainable changes to the budget and policy decision-making process. Sharp conceded that the gender budgeting initiative did raise awareness of gender issues within the government, but often the people who achieved this understanding were not necessarily the ones with the authority and power to make changes.⁹

While raising awareness is important, Sharp (2004) maintains that the linchpin for sustained gender budgeting is promoting government accountability, without which there is no basis for sustained action. Without the political will and support of those in top leadership positions, the initiative will not be sustained beyond the period of financial support from international donors. This kind of political will and government ownership of the program was lacking in Samoa. The project steering committee tried to establish a high-level budget committee with responsibility for screening and prioritizing budget proposals with significant social impacts. However, this did not materialize during the short tenure of the pilot. Since the completion of the pilot project in 2003, only limited progress has been made on gender budgeting.

Current State of Gender Budgeting in Samoa

While gender budgeting is not currently taking place in Samoa, recently there has been renewed push toward gender mainstreaming, with the likelihood of gender budgeting being one strategy toward its accomplishment. In 2013 the government of Samoa underwent a stocktaking of its capacity to mainstream gender. The aim of the stocktaking was to analyze the extent to which there is an enabling environment for gender mainstreaming in Samoa (SPC 2015b). The assessment was the initiative of the Secretariat of the Pacific Community, in collaboration with the government of Samoa and with support from the government of Australia.¹⁰ The assessment resulted in a proposed Gender Program to strengthen gender mainstreaming processes across the public service. In fact, the Ministry for Women, Community and Social Development—the main women's machinery for Samoa—noted that the government of Samoa recognized “the need for a

⁹For example, Sharp noted that gender budget initiatives require the support and participation of the Ministry of Finance as well as the finance minister, but the culture, skills, and perceived priorities of the Ministry of Finance in Samoa severely constrained the contribution of even well-intentioned individuals in this ministry. She concluded that this pointed to the need for additional capacity building among key participants to forge stronger links between raising awareness about gender issues and the everyday work of these ministries (Sharp 2004, 12).

¹⁰The stocktaking was a regional initiative led by the Secretariat of the Pacific Community involving 22 countries from the Pacific and territories.

more coordinated and strategic approach to addressing gender mainstreaming, not just by government but by all development partners collaborating with the Government of Samoa” (SPC 2015b, 2).

One of the proposed measures to enable gender analysis is the standardized collection of sex-disaggregated data, with an emphasis on a set of core minimum gender indicators in relevant areas (Government of Samoa, 2015). Already work has started in this area with the 2013 Samoa Education Statistical Digest providing sex-disaggregated data and analysis in terms of school enrollment. Furthermore, the Police Domestic Violence Unit, with help from UN Women, has compiled sex-disaggregated data on domestic violence and sexual abuse (SPC 2015b). Additionally, the Cabinet Development Committee’s decision to introduce gender analysis as a requirement for any aid project proposal should further help to lay the groundwork for gender budgeting.