

## **INTEGRATING GENDER INTO PUBLIC EXPENDITURE: LESSONS FROM THE REPUBLIC OF THE MARSHALL ISLANDS**

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In 2003, the Republic of the Marshall Islands (RMI) became the first Pacific Island government to introduce a gender budget initiative (GBI) as a strategy for promoting gender equality. Important enabling factors which facilitated the GBI included the RMI's matrilineal culture, its strong women's nongovernment organizations (NGO) base and a raft of budgetary reforms seeking to increase transparency and accountability. However, a poorly resourced women's office within the government, low numbers of women holding political office, and the absence of key gender accountability mechanisms limited the success of the initiative. The most significant constraining factor was the RMI's budgetary context, including the uncertainty created by the US-RMI Compact negotiations. A key lesson for other countries is that GBIs, like any budgetary reform process, encounter a range of problems in changing budgetary processes and decision making, including a lack of political will of the government.

### **Introduction**

IN 2003, the Republic of the Marshall Islands (RMI) became the first Pacific Island Country and Territory (PICT) government to introduce a gender budget initiative (GBI) as a strategy for promoting gender equality. Gender equality was enshrined as a fundamental principle by PICT governments in the 1994 Noumea Declaration, which established the Pacific Platform of Action (PPA) as the region's plan for women's social and economic development. The PPA was revised in 2004, and GBIs were identified as

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a key strategy in its implementation.<sup>1</sup> The purpose of these initiatives is to make government budgets more responsive to their different impacts on women and men, boys and girls. A gender perspective is utilized to “follow the money” throughout the different phases of the budgetary and policy decision-making processes.<sup>2</sup> The budget is important in the pursuit of gender equality and women’s empowerment because it is the means through which policies are implemented; it is where government promises are turned into actions. In this respect, the budget can be viewed as a mirror, expressed in financial terms, of the social and economic priorities of a country.

Engaging with the government budget is fundamentally a political activity, and considerable political will and accountability is required of governments to transform their gender equality commitments into funded policies and programs. Political will and accountability is assisted by the presence of women in the decision-making structures of government and active civil society groups, among other things. It is also enhanced by transparent and accountable budgetary institutions and practices. Few of these conditions had a strong presence in the RMI, suggesting that a GBI would be a risky project to undertake. Nevertheless, the RMI GBI achieved a degree of success. First, it raised awareness and understandings of gender issues in budgets and policies among government officials and women’s nongovernment organizations (NGO). Secondly, the initiative contributed to government transparency and accountability for its budgetary and policy impacts on gender equality in several ways. These included increased use and availability of gender-disaggregated statistics, the undertaking of research and analysis of an important gender issue, and the engagement of civil society in the budgetary decision-making process. Third, the initiative provided an agenda for budgetary and policy change for promoting gender equality by identifying funds that could be reallocated to programs that could positively impact on teenage pregnancy. It also fostered an appreciation among the government officials and NGO participants in the project of the need for a cross-agency policy and budgetary responses to gender issues. The questions that this paper addresses are: what made these achievements of the RMI GBI possible? And what are the lessons for other PICTs embarking on a similar strategy?

### **Background to the RMI Gender-Responsive Budget Initiative**

Budgets matter because they have profound impacts on the social and economic fabric of a country. As the Asian Development Bank (ADB) argues, “government budgets have a central role in the planning and control of countries” and are powerful policy tools that can affect social equity (ADB

2001, 1). The RMI GBI, externally initiated by the ADB, emphasized this perspective. The ADB justified its choice of the RMI for a gender budget pilot in the Pacific in terms of its policy agenda. The bank's terms of reference situated the initiative as "coordinating with the ADB's ongoing assistance in finance, planning and economic reform, particularly in the development of sound public management systems" (ADB 2001, Appendix A). In particular, a GBI provided the opportunity to enhance one of the pillars of public expenditure management, namely an increased role for civil society in the policy and budgetary process. Consequently, the ADB approached the RMI government, resulting in an agreement that the RMI Ministry of Finance would coordinate the pilot with technical assistance provided by external consultants and participation by local NGOs.<sup>3</sup>

The ADB's technical assistance package for the RMI gender budget pilot comprised two key stages. The first involved an assessment by the technical assistance team of the foundations for a successful GBI in the RMI. This included identifying the socioeconomic situation of Marshallese women and girls; auditing government policies and social conditions influencing gender equality; and assessing the budgetary context of the RMI. The assessment was undertaken to ascertain key factors that would both constrain and progress the development of a GBI within the government. The second stage of the initiative drew on the principles of action research and entailed the active participation of a core group of government officials. These included joint Ministry of Finance project coordinators (which included an Assistant Secretary of the Ministry), the Women's Desk Officer from the Ministry of Internal Affairs, and NGO representatives. This local group worked with the technical advisors under the umbrella of a steering committee responsible for the design and implementation of the project. The principles of action research allowed the various stakeholders involved reflexively to adjust the parameters and strategies of the initiative according to changing circumstances, as well to acquire new data and understandings. The development of workshops for NGOs and government officials from various ministries comprised a key aspect of this second stage of the technical assistance. These workshops, discussed in detail below, were designed to build capacity and raise awareness around both gender and budgetary issues in the RMI, with the aim of engaging policymakers and civil society in the technical and conceptual aspects of implementing a GBI.

### **Foundations of the Gender Budget Initiative: Women's Status, Gender Equality Mechanisms, and Budgetary Politics in the RMI**

Various conditions, or what we label "enabling" foundations, in a country's social, economic, and political environment are important for the success

of a GBI. These enabling foundations comprise both gender-specific and broader factors that assist and promote the achievement of such initiatives in securing positive budgetary outcomes for women and girls. In reality, enabling foundations are often accompanied by “constraining” or weaker foundations that work against the success of the GBI. In the RMI, a combination of enabling and constraining foundations proved important in shaping the strategies and goals of the initiative, as well as determining its ultimate success. The RMI’s matrilineal culture, the strong women’s NGO base, and a measure of commitment by the government to gender equality were enabling factors. At the same time, a poorly resourced women’s office within the government, low numbers of women holding political office, and the absence of key gender accountability mechanisms served as constraining foundations and limited the success of the initiative. It was further apparent at the outset of the project that a potentially significant constraining factor was the RMI’s budgetary context, including a weak institutional framework, lack of resources, and the uncertainty created by the US-RMI Compact negotiations. These factors are explained in detail below.

#### *Paradox of Women’s Inequality within a Matrilineal Society*

Most PICTs have experienced growing economic and social inequalities and conflicts arising from the exclusion of various categories of their citizenry from the benefits of “development” (Naidu 2002). In the RMI, where only limited development has been achieved, few resources are available for promoting the economic and social position of women and girls. In the country’s tiny economy, the state plays a pervasive role, and aid and compensation from the United States are its mainstay. Moreover, in spite of levels of aid that are among the highest in the world on a per capita basis, the economy has registered many years of low or negative growth (ADB 2006).<sup>4</sup> In the view of one commentator, this top-down, supply-driven approach to social service delivery has resulted in a state of apathy and sense of dependency across the society (Dugue 2003). In the view of the Asian Development Bank (2006), extended family ties and close relationships within the small population have kept pervasive poverty from being a major problem. Nevertheless, considerable inequity exists, including inequalities between men and women, although it is contended here that the strong matrilineal culture has served as a buffer to some of its consequences.

In the RMI’s matrilineal society, women have always played important roles that have been clearly defined in the traditional system.<sup>5</sup> The image of mother—and more significantly that of sister—provides the underlying framework for thinking about and acting in social relations (McArthur

2004, 58). The Marshallese woman is the foundation of the family, responsible for the welfare of its members. Her duties include child care, food preparation, and household chores preserving family ties, as well as fulfilling obligations to community groups such as the church. More important, Marshallese women possess rights of land ownership and inheritance, and these rights are recognized in the country's constitution (South Pacific Commission 1995, 89, 97).

While it is evident that the traditional roles of women continue to be recognized and respected (Pacific Services Region 2005), it is also understood that the status of women in the changing environment of the RMI is continually evolving (South Pacific Commission 1995). One Marshallese commentator describes the traditional gender relations in the RMI as being "disrupted by" a historical continuum of factors ranging from "the early traders and whalers right up to contemporary processes of globalization and the various changes it produces" (Maddison 2003, 4). Similarly, Dugue (2003) observes that, in recent years, the migration of many Marshallese to the urban population centers of Majuro and Ebeye and the consequent increased exposure to non-Marshallese values and culture have helped weaken the traditional cultural norms and organization that have been central to the society. Such observations have led to a local perception that "gender relations between men and women in the RMI have long departed from the traditional language and culture" (Maddison 2003, 6).

Women's current socioeconomic status in the context of RMI development is less clear than it has been in the past (Global Education, no date). It has been observed that, over the past thirty-five years, women have significantly improved their economic status relative to men, although significant gender gaps in education, wages, and employment continue to exist (Graham and Paul 2002).<sup>6</sup> Others argue that "the traditional authority exercised by women has declined" (U.S. Department of State 2006), and this is manifested in their low participation in the Marshallese labor market, as well as their limited access to services including education and health.<sup>7</sup> For example, reproductive health services are available at both hospitals in Majuro and Ebeye, but the prenatal, natal, and postnatal services in the outer islands are rudimentary (EPPSO 2003, 47).<sup>8</sup> The current lack of services builds on a history of severe health issues resulting from atomic testing that took place on the atolls in the 1950s.<sup>9</sup>

Other services for women including those related to domestic violence and teenage pregnancy were also limited. The U.S. Department of State (2006) identified violence against women as a serious human rights issue in the RMI. This report cited a 2003 report issued by the leading women's

NGO Women United in the Marshall Islands (WUTMI), showing that more than 80% of women had been affected by spousal abuse. Similarly the incidence of teenage pregnancy in the RMI continues to be the highest among the PICTs. The rate of pregnancy among young women and girls aged under twenty years rose from 20% to 22% between 2000 and 2002 (Chutaru 2003, 11).<sup>10</sup> According to the Economic Policy, Planning, and Statistics Office (EPPSO), poor standards of education, high school drop-out rates, a lack of guidance from parents, and underutilization of family planning practices are contributing factors to the high incidence of teenage pregnancy (EPPSO 2003, 5).

The traditional matrilineal culture, which remains highly relevant to contemporary Marshallese society, served as an enabling foundation for the GBI by providing it with a basis for sympathy and support. At the same time, it is important to recognize that the contemporary socioeconomic status of Marshallese women and girls is subject to a variety of pressures, which are manifested in gender gaps in education, employment, government services, and high teenage pregnancy rates. Such gaps partly reflect weak or absent gender equality mechanisms within government.

#### *Gender Equality Mechanisms within Government*

A number of weak gender equality foundations were identified within the Marshallese state at the outset of the initiative. One of these was the relatively low representation of women in the RMI's key decision-making structures of government. Certainly there are no legal impediments to women's participation in government and politics. Moreover, there is a trend toward more women taking up key government positions within the bureaucracy, indicating that women are increasingly influencing politics and development (Graham and Paul 2002). However, an array of factors including women's cultural responsibilities and the generally early age of pregnancies make it particularly difficult for women to obtain political qualifications and experience (U.S. Department of State 2006). Consequently, the numbers of Marshallese women in the formal institutions of power remain low.<sup>11</sup> This situation raised dilemmas for the GBI including how a male-dominated legislature (the Nitijela) might initiate and allocate resources to policies and programs advancing gender equality.

At the same time, it is important to recognize that gender politics in the RMI is highly influenced by kinship ties, which play a significant role within the state. McArthur argues that the boundary between the nation-state and kinship is blurred in the RMI, and the latter, in effect, provides a system of social relations through which people make sense of, and act within, the

modern nation-state (McArthur 2004, 79). Kinship provides alternative, informal avenues of power through which women can influence government decision making. This was demonstrated on several occasions throughout the course of the project.<sup>12</sup> While the low representation of women in the formal realm of politics was a constraining influence on the success of the project, kinship ties on occasions provided an avenue for gender budgeting to be promoted within government.

A further constraint for the GBI was the lack of women's policy machinery within government. In order to consolidate the improvements and ameliorate some of the growing concerns surrounding gender issues, the RMI government established the Women's Desk in 1979. During the period of the gender-responsive budget initiative, the Women's Desk (located within the Ministry of Internal Affairs) had the enormous task of coordinating all government activities concerning women and development, despite a severe lack of resources and inside-government gender expertise. It employed one full-time staff member and had a total budget of US\$50,000.<sup>13</sup> In 2002, after the salary of the Women's Desk Officer was deducted, the remaining budget was largely allocated to supporting the Women United in the Marshall Islands (WUTMI) NGO conference. Consequently, there were no financial or human resources available to target problems specifically affecting Marshallese women and girls such as those related to health and education. Moreover, the RMI women's policy expired in 2001, signalling a lack of policy direction and commitment to allocating resources for gender equality.

At the time of the GBI, the RMI government was not a signatory to the UN Convention for the Elimination of all forms of Discrimination Against Women (CEDAW).<sup>14</sup> This signalled a low formal commitment to gender equality by the RMI government. This was further demonstrated by the lack of up-to-date gender-disaggregated data and gender-sensitive indicators in all spheres to establish and monitor progress around gender equality. The establishment at a later date of the EPPSO by the Nitijela of the RMI in January 2003 was to prove important in remedying this problem.

Some gender equality mechanisms did exist at the international, regional, and national levels which the initiative drew on. The RMI government was a signatory to the Pacific Platform of Action as well as the Convention on the Rights of the Child. These public commitments provided regional and international mechanisms of accountability for civil society and bureaucrats to refer to when promoting the importance of the GBI among the higher echelons of government. Other mechanisms of accountability included the RMI National Plan, Vision 2018, which incorporated the principle of gender equality; however, there appeared to be very little awareness of Vision 2018

among senior public sector decision makers or civil society even though it was developed utilizing a wide-ranging consultation process.<sup>15</sup>

One of most important enabling foundations for the GBI in the Marshall Islands was the country's emergent NGO base and, in particular, the surge in the formation of Marshallese women's groups (Graham and Paul 2002). WUTMI was established in 1987 as the key umbrella group representing grassroots women's NGOs throughout the country. Although mainly involved in projects preparing younger women to take their role in society as mothers and businesswomen (EPPSO 2003, 290), WUTMI nevertheless had a key political role to play. At the time the GBI was being developed, WUTMI was on the rise after several years of being defunded by the government. It had won a significant U.S. grant and held a successful conference in the early phase of the GBI. For the RMI GBI, the involvement of civil society, and more specifically WUTMI, acted as one of the main accountability mechanisms for the initiative. The WUTMI representative on the gender budget steering committee proved to be a crucial voice in shaping the initiative and ensuring that a budget bid was developed. The NGO sector was an important source of research on the issue of teenage pregnancy, which became the focus of the GBI. WUTMI publicly supported the initiative by ensuring its members attended the gender budget workshops where the budget allocations were scrutinized. It also promoted the project, including gaining media coverage. Furthermore, the active participation of WUTMI in the initiative led to senior bureaucrats indicating in their workshop evaluations that they had developed a greater appreciation of the potential accountability role of NGOs in the budget process.

### *Budgetary Foundations of the Gender Budget Initiative*

The RMI's budgetary context manifested a variety of constraints as well as certain opportunities for the initiative to succeed. Many developing countries, including those in the Pacific region, are undergoing significant restructuring and institutional changes to their budgetary and policy processes with the introduction of a raft of governance reforms. In the RMI, these include institutional strengthening of the Ministry of Finance with the introduction of computerized systems, the piloting of performance-based budgeting systems, and the development of planning processes. In practice, these "good governance" reforms have often been biased in favor of the agendas of international financial institutions and donors. However, as Hewitt and Mukhopadhyay (2002) argue, the process of ensuring that goods and services are delivered to people in a fair, efficient, and effective way through



the implementation of the principles of transparency, accountability, and participation is an underpinning rationale for GBIs.

In this sense, good governance is an important component of sustainable human development and poverty alleviation in that it widens opportunities through making information accessible and available (transparency), decreases the incentives for corruption and mismanagement through calling the government to task (accountability), and supports a more participatory approach to the design, implementation, and evaluation of policies and programs (Hewitt and Mukhopadhyay 2002, 58). These processes were not well developed in the RMI, with an ADB report concluding that budget preparation, presentation, and reporting were below minimum international standards (ADB 2000, 11). The introduction of a GBI at a time when new budgetary processes were being implemented in the RMI had the positive effect of allowing gender issues to get in on the ground floor of these changes. The constraining factor, however, was that the GBI was competing for time and resources within a Ministry of Finance that was being stretched to its capacity. Also, despite the introduction of a number of reforms, the budgetary system still lacked minimal standards of transparency and accountability, including the absence of any published budget papers.

As the GBI progressed, it became increasingly evident that the RMI's political and economic environment was ultimately critical in determining the degree of its success. According to the ADB, the RMI is a highly aid-dependent nation that "faces some of the most daunting development challenges of any country in the world" (2006). The main factor influencing the country's political and economic context and coloring "nearly every story on the Marshall Islands" (Johnson 2004, 127) is the Compact with the United States.<sup>16</sup> For several generations, the population has been accustomed to being provided for by the U.S. administration through the Compact. U.S. payments for occupancy of the Kwajelin base (US\$180 million over 1986–1999), compensation for injuries arising from nuclear testing in various atolls (at least \$250 million), and other agreed payments and grant support for programs under the Compact totaled over US\$1 billion between the signing of the agreement in 1986 and the termination of its first fifteen-year phase in 1999 (Fraenkel 2002, 299). Compact funds make up 55% of the current government budget, and millions more are added to the economy through U.S. federal programs (Johnson 2004, 127). Other sources of revenue are limited.<sup>17</sup>

The budgetary dependence of the RMI mirrors its political dependence on the United States. Under the Compact, the United States has full authority and responsibility for security and defense of the Marshall Islands and continues to use one of the country's atolls as an army base. During the

course of the GBI this agreement was being renegotiated for the next fifteen years. The extensive negotiation around the Compact and the delay in finalizing the agreement negatively impacted on the formulation and execution of the 2003–04 budget of the RMI, which in turn undermined the gender-responsive budget initiative.

Another factor that had adverse implications for the GBI was the political uncertainty evident throughout the final phases of the project in 2003. Marshallese citizens live with an emergent democratic political system combined with a hierarchical traditional culture. In November of 2003, the ruling United Democratic Party (UDP) was returned to power in national elections, with President Note (UDP) resuming office. Although this was a predictable outcome, 2003 as an election year contributed to ministerial changes (most notably, the Minister of Finance changed during the course of the project) and fostered a degree of uncertainty in relation to developing and implementing new programs and systems. This created somewhat shaky foundations for the GBI. On the other hand, an election year offers increased opportunities to call a government to task for its gender equality commitments. This was recognized, for example, by the project's steering committee's action plan, which included radio broadcasts on the GBI's focus area—teenage pregnancy—and activities to ensure that the new Finance Minister was briefed about the project.

The Compact, the reforms occurring within Treasury, and the national election had an increasingly significant and often contradictory influence on the outcomes of the gender budget project. For example, a tough economic backdrop, as evidenced by business bailouts and increased poverty rates, made it imperative to secure a satisfactory Compact package (Johnson 2004, 127). Such an outcome was congruent with a gender-responsive budget. However, RMI–U.S. Compact negotiations contributed to the collapse of the normal budgetary processes in the year of the pilot project, making budgetary changes promoting gender equality particularly problematic. In sum, the combined effect of the budgetary context was to provide relatively weak economic and political foundations for the implementation of the GBI. Enabling factors, however, did emerge at different phases of the initiative, including an increased emphasis on transparent budgetary processes, a measure of political accountability during an election year, and the much publicized Compact negotiations.

### **Implementing the Gender Budget Initiative**

The budgetary context, combined with other enabling and constraining foundations, was imperative in shaping the outcomes of the GBI. However,

the design and the implementation of the project were also pivotal in the initiative's degree of success.

The starting point of the design and implementation of the RMI GBI was to ensure the participation of the local stakeholders in what was an externally initiated and donor-funded project. This was crucial for several reasons, most important, the promotion of local ownership of the initiative. Local ownership of the project was based on the premise that development must be driven by those who seek to develop—"it cannot be done to others on behalf of third parties" (Davenport 2000, 1).

Several strategies were incorporated into the project's methodology to deal with promoting local ownership, the most important being the responsibility of the RMI steering committee for developing a proposal to take the project forward in a way that was tailored to the RMI context. In addition, an international mentorship program was developed to support the committee members to drive the project. Other strategies included the use of "local voices" in training, whereby local presenters and researchers were used as much as possible, and conducting training in the Marshallese language where possible.

A second pivotal factor in designing the project was the lessons of the Commonwealth Secretariat GBIs, which had been piloted in several countries including the island states of Sri Lanka, Barbados, and St. Kitts and Nevis.<sup>18</sup> The Marshallese initiative, like many of its Commonwealth predecessors, was institutionally located "inside government," and more specifically was coordinated by the Ministry of Finance with several ministries participating in the project, including the national statistical office (EPPSO) and the Chief Secretary's Office as well as line ministries delivering the relevant programs, in order to draw upon key stakeholders and resources within the state. Another key lesson drawn from the Commonwealth GBIs was the crucial role of civil society in ensuring positive outcomes from "inside-government" initiatives. The Marshallese steering committee was aware from the outset that, while the Ministry of Finance must be an integral part of driving the project given their expertise in budgetary processes and input into the formulation of the budget, civil society is equally essential, since finance ministries are not good at championing the gender sensitivity of budgets. Accordingly, the RMI Ministry of Finance adopted a strategy of broadening its gender expertise and stakeholder base by including a representative from WUTMI on the steering committee and within the mentorship program.

A third lesson drawn from the Commonwealth gender budget pilots was the need to have clear goals and to design the strategies accordingly (Sharp

2002). It was understood by the steering committee that GBIs running over a single budget cycle are mainly limited to raising awareness about the gender issues and impacts of policies and budgets. As a result, the committee worked on the understanding that a gender analysis of the budget, which was the focus of training workshops, does not by itself result in the formulation of a more gender-sensitive budget (Sharp and Broomhill 1990; Hofbauer 2003). Strategically engaging with the budget decision-making process would be necessary if the pilot initiative were to achieve goals other than raising awareness of gender issues in budgets.

These lessons were incorporated into the RMI initiative through the development of a conceptual framework at the outset of the project. This framework articulated the goals of the initiative as well as identifying the strategies that would be used to promote them.<sup>19</sup> These core and interrelated goals of the RMI gender-responsive budget initiative were (1) raising awareness and understandings of gender issues in budgets and policies; (2) promoting greater government transparency and accountability for its budgetary and policy impacts on gender equality; and (3) changing budgets and policies so that gender equality is promoted. Training workshops for government officials and civil society representatives as well as an international mentoring program for members of the steering committee (which included an intensive five-day planning process while visiting Australia) were key strategies utilized in the implementation of the project's goals.

In an attempt to promote the first goal, for example, the first government workshops began with the presentation of gender-disaggregated data derived from the national census by the national statistician, followed by a presentation of the factors that have shaped gender relations in the country by a local researcher. This enabled stakeholders to develop an understanding of the current gender gaps and the historical influences on gender relations in the RMI. In combination with an exercise where the participants identified examples of the potential gender impacts of their ministry's activities, these workshops sought to promote a deeper awareness of gender relations in the RMI and their implications for policy.

The second goal of calling governments to task for the impacts of their policies and budgets on gender equality and women's empowerment proved more difficult. An example from the NGO workshop involving participants from WUTMI illustrates the significance of civil society in strengthening gender-related budgetary accountability. At this workshop, a budget role-play took place in which NGO delegates "acted" as government officials and civil society representatives. Those acting out government roles were assigned to different ministry "teams" that represented the actual ministries

participating in the project (finance, resources and development, internal affairs, health, and education). The objective of the game was for the different “ministries” to achieve a budgetary outcome that enabled them to implement a program around the issue of teenage pregnancy. Participants learned that, as line ministries, they must properly justify their arguments to Finance, and as NGOs, they have the important task of monitoring government actions for signs of corruption as well as questioning policies and programs around their gender impacts.

This game was developed to illustrate the importance of the budget in gender outcomes and the crucial advocacy role of NGOs. It also highlighted the key political and economic elements of the development of budget proposals, the significance of cross-ministry gender issues, and the importance of the budgetary context in shaping gender-responsive budget initiatives. In extending these capability-strengthening exercises to Marshallese NGOs, the project succeeded in providing them with an elementary knowledge of how government budgets work and some basic tools for holding the government to task on its gender equality commitments.<sup>20</sup> As one NGO workshop participant expressed it:

Now I've got a good understanding of gender responsive budget[ing], I, as a member of a NGO, can put pressure on the government to be more sensitive and more aware of issues that affect women. (Sharp, Vas Dev, and Spoehr 2003, 67)

The final goal, changing funding and programs to deliver better teenage pregnancy services, was the most problematic for a one-year pilot project. Teenage pregnancy was chosen by the steering committee because it was a topic of community concern for which support could be garnered both within government and in the community. Focusing on a single issue (teenage pregnancy) was thought to be the best way to make some change to the budget within a year. The gender budget analysis revealed only two existing government programs to address teenage pregnancy. Subsequent discussion with ministries also revealed that, although most ministries' budgets did not directly focus on teenage pregnancy, the work of almost all ministries potentially impacted on teenage pregnancy. For example, the Ministry of Education led a program to train school nurses, while the Ministry of Health conducted various reproductive health and family planning programs and dealt with treatment of rape victims. The initiative generated an understanding of teenage pregnancy as an important cross-cutting issue that had diverse impacts across all sectors of RMI society. This led to a greater interest among

participants from both the government and NGO sectors in the issue and, significantly, an awareness of how the budget can have impacts on teenage pregnancy beyond teenage-pregnancy-specific programs.

In the process of establishing the cross-ministry nature of teenage pregnancy, the budget analysis generated a lively discussion among participants in which a multiplicity of issues emerged, such as lack of funding and the complexity of trying to develop a coordinated policy approach. The discussion concluded with the decision to develop a coordinated cross-agency budget bid for teenage pregnancy. The development of this bid became the strategy through which the participating ministry teams could promote the third goal of changing budgets, whether it be through new funding, a reallocation of funding, or better coordination of resources across ministries.

Two meetings were held between these ministries and the Chief Secretary's Office, the latter being a key player in deciding which budget bids would be supported. During these meetings, each ministry had the opportunity to map out their funding allocations for programs and outputs directly or indirectly impacting on teenage pregnancy. The process of sharing information about the programs being conducted enabled the ministries to identify some duplications and gaps in programs on teenage pregnancy. At the same time, however, the bureaucratic politics around ownership of the teenage pregnancy program and a lack of strong leadership by the Ministry of Finance contributed to a breakdown of communication among those involved in the budget project and posed an obstacle to any further achievement. The course of events demonstrated to participants the realities of negotiating around the budget and the importance of political will and accountability in its outcomes.

Nevertheless some budgetary changes did take place as a direct result of the capacity-building exercises. For example, the Ministry of Internal Affairs identified a reallocation of funds that could be spent on a teenage pregnancy program. Unfortunately, this did not occur because the Women's Desk Officer—a member of the project's steering committee—was shifted from her position toward the end of the pilot project, a key time in the budget process, and the opportunity was lost when a less experienced officer took over with the result that the funds did not get spent on time. In a more successful example, the Ministry of Education decided to target a federal U.S. grant received for health education among adolescents to the issue of teenage pregnancy. While the bid for new funding for teenage pregnancy was not successful, some budgetary and policy changes were achieved by redirecting resources to change the type and quality of teenage pregnancy services delivered by the government.

## Conclusion

The RMI GBI, the first of its kind in the Pacific, provides important lessons particularly for those PICTs seeking to implement the Revised Pacific Platform for Action on the Advancement of Women and Gender Equality 2005–2015. The broad lesson is that there is no single approach or blueprint for making budgets respond to gender issues and inequalities. Each society has to find its own way to make connections between its budget and its prevailing pattern of gender inequality in order to make the necessary changes. In particular, an understanding of the factors that provide opportunities for the project to succeed and recognition of the constraints to its success are important in assisting the various stakeholders to determine which strategies to take in formulating a GBI suitable for their country's conditions.

The RMI's unique socioeconomic and cultural circumstances underpinning women's status in the society, along with gender equality mechanisms within the state and the budgetary and political context, had a marked effect on the achievements of the project. One of the key lessons relevant to other PICTs seeking to introduce similar initiatives is the importance of understanding how these factors served as enabling or constraining foundations to the GBI. In the RMI case, the low levels of women's parliamentary representation, the lack of government services for problems affecting women and girls, a poorly resourced women's office within government, and a budgetary system that lacked minimal standards of transparency and accountability were important constraining factors. At the same time, the country's matrilineal culture and kinship ties (evident within the political sphere), the formal gender equality mechanisms that did exist at the national, regional, and international levels, the active participation of WUTMI, budgetary reforms that facilitated gender transparency and accountability, and an election year provided a buffer against the impact of the constraining factors and fostered the initiative's measure of success.

The design of the GBI also played a role in its qualified success. Three lessons in particular can be drawn from the RMI case for other PICTs establishing similar projects. The first was the importance of developing local ownership of externally funded and proposed initiatives. When asked about improving capacity-building initiatives at a multistakeholder workshop hosted by the Pacific Islands Association of NGOs in 1999, many participants maintained that they should have a Pacific definition and a conceptual framework that reflected their organizations' view of the world (Low and Davenport 2002). The incorporation of local voices through the GBI's steering committee, which was mentored and given oversight of the project, facilitated local ownership. A second lesson was the crucial contribution of civil society

in such projects. WUTMI was an important and positive force in the RMI gender equality foundations and fundamental to the achievements of the initiative. Even the most committed government officials require a strong mandate from the community to foster gender equality and women's empowerment in society. Moreover, governments more generally tend to deliver gender justice through their budgets only if considerable pressure is exerted on them (Sharp 1999). However, as others have noted, while there is room for optimism that civil society groups can make a significant contribution to various applied budget initiatives, in many cases, further progress on skills development in budget analysis will be necessary and thereby entail significant assistance (Krafchik 2002). This will be a critical ingredient in the success of further gender-responsive budget initiatives in the Pacific.<sup>21</sup>

A third lesson of the RMI experience can be drawn from the important insights into bridging the gap between analyzing budgets for gender impacts and changing budgets to make them more gender sensitive, which is an issue for gender-responsive budget initiatives worldwide. It is now widely acknowledged that a gender analysis of the budget does not by itself result in the formulation of a gender-sensitive budget (Sharp and Broomhill 1990; Hofbauer 2003). The RMI's adoption of a conceptual framework that linked strategies to goals facilitated an explicit understanding that the initiative needed to go beyond a gender *analysis* of the budget to achieving gender-sensitive budgetary *changes*. The steering committee's preparedness to entertain a budget bid on teenage pregnancy combined with the positive response of key ministries resulted in some budgetary changes. While minimal outcomes were achieved in terms of changing the budget, some important foundations were laid for future initiatives. For example, the initiative challenged the stand-alone or "silo" mentality that existed among government officials in the RMI that was entrenched by the lack of formal cross-ministry mechanisms available to deal with cross-cutting issues. This opened opportunities for greater cooperation between ministries in the future, which is important for improved gender outcomes because women's desks and ministries invariably have very limited resources and ultimately rely on alliances with other ministries to implement gender-sensitive programs and budgets.

Ultimately, it was the broader budgetary context in the form of the politics of the RMI-U.S. Compact negotiations that contributed to the collapse of the normal budgetary processes in the year of the project, making significant budgetary and policy changes largely impossible. The powerful ramifications of the Compact agreement on budgetary decision processes highlighted the political nature of budget decisions which gender-responsive budget initiatives, like all budgetary reform processes, must negotiate in order to change policies and budgets.



## NOTES

1. In August 2004, the PPA was revised at the 9th Triennial Conference on Pacific Women and the Second Pacific Ministers Meeting on Women in Nadi, Fiji. A key theme of these discussions was the emphasis on adequate resources. More specifically the Pacific Secretariat called on Pacific governments and administrations "to further strengthen their commitment towards increasing resource allocations to the various national women's machineries to assist them in the full and effective implementation of the Revised Pacific Platform for Action" (Secretariat of the Pacific Community 2004, 8). GBIs were identified as a key strategy for implementing the revised PPA. See Sharp (2005) for a discussion of the three countries—Samoa, Fiji and the RMI—that introduced some form of a GBI prior to the revised PPA.

2. The idea of incorporating a gender perspective into government budgets gained momentum internationally in 1995 when the United Nations (Beijing) Platform of Action for Women recommended that governments systematically assess how women benefit from government expenditures and adjust budgets so that there is equality of access to public sector expenditures (UNIFEM 2000, 112). Some type of GBI has now been introduced in over 60 countries across all continents of the world (Sharp 2005; Rubin and Bartle 2005).

3. The technical assistance was part of a regional technical assistance project "Youth- and Gender-Sensitive Public Expenditure Management in the Pacific." The RMI was the pilot for a GBI, and Samoa was a youth and gender budget pilot initiative. The technical assistance was provided by a small team of academics from the University of South Australia, Australia, who drew on international best practice to provide training and advice to senior government officials and NGOs.

4. Statistics from the Asian Development Bank (2006) reveal that economic growth in 2003 stood at 1.8% (and 4% in 2006). Per capita growth in 2003 was -2% (compared to 0.04% in 2006).

5. The exception is the Enewetak atoll, which is patrilineal.

6. For example in 1967, less than 4% of adult females were high school educated. By 1999, this had increased nearly tenfold to over 33%, while the male rate increased by only about four times. Additionally, while only 15% of adult females were employed in the RMI in 1967, over one-third of them were employed in 1999. Meanwhile, this rate actually dropped for males, clearly showing that women's "market share" of the RMI labor market increased relative to men. The female to male wage ratio, a quotient of females' to males' mean wages, increased over time. According to 2002 survey data, females earned US67 cents for every dollar earned by males, a sizeable increase from US58 cents in 1980. At the same time, a significant gender wage gap continues to exist.

7. With regards to the labor market, it is evident that, while many educated women hold prominent positions, particularly in government (U.S. Department of State 2006), and female workers remain prevalent particularly in the private sector, many remain in low-paying jobs with little prospect for advancement (U.S. Department of State 2006). Similarly, with regards to women and education in the RMI, data from the Economic Policy, Planning and Statistics Office (EPPSO) reveals that the high school drop-out rate

amongst female students was 43.3%, while it was 38.7% for male students in 2002–2003. While the factors accounting for such statistics remain beyond the scope of this paper, the practice of early marriage and teenage pregnancies have been cited as forcing female students to abandon their studies (EPPSO 2003).

8. Traditional Marshallese medicine and cultural practices regarding pregnancy, birth, and child care remain strong. Modern medical care supplements Marshallese medicine, especially in areas of health care that remain located in traditional spheres.

9. On 1 March 1954, the United States exploded an atomic bomb, code-named Bravo, which dropped its nuclear fallout on populated islands of the northern Marshalls. The immediate results were burns, hair loss, nasty sores that did not heal, and subsequent stillbirths and “jelly baby” births. In the period immediately following the incident, women from the atoll of Rongelap reported to U.S. health monitoring teams that they were producing “jelly babies,” or malformed foetuses, which were expelled after four or five months of pregnancy, although sometimes full-term, which was very distressing to these mothers. The long-term results were cancers, especially high rates of cancer of the goiter, and goiter nodules, with the ongoing effect of stunted growth and reduced immunities of children born 20 and 30 years after the explosion (Pollock 2004).

10. Figures from EPPSO indicate that this had declined to 17% in 2003.

11. Hence, in 2003 for instance, one female mayor was elected in the various atolls (compared to 23 males); one women senator was elected to the RMI parliament (the Nitijela; compared to 33 males; EPPSO 2003, 30); and in 2005, there were no women judges in the country (U.S. Department of State 2006).

12. For example, the first NGO workshop for the project was organized at the Parliament and was disrupted half an hour before it began by an instruction that the President would be using the room booked for the workshop. The women were subsequently crammed into a much smaller room and had to sit on the floor due to the lack of space. The workshop began with a round asking the women to name a key gender issue in the RMI. The first speaker, a prominent Marshallese woman, said what had just happened was a key gender issue and indicated that this message needed to be taken to those who had shifted the workshop out of its scheduled room. Soon afterward we were informed that the original room would be available immediately.

13. In December 2004, the Women’s Desk was physically relocated to the newly built government-owned Women’s Training, Marketing and Information Center. The center is an ADB-funded loan project, which comprises a vocational training institute that addresses particular training areas. The center is to be used for the marketing of handicrafts and to store resources to be used for research or training purposes. To date, no Women’s Information Desk officer has been officially appointed, although two staff people are employed in that capacity.

14. In recent times, several UN Human Rights conventions including CEDAW have been considered by the Nitijela. At the WUTMI Seventh General Assembly for Women in October 2004, a resolution was submitted to the Nitijela with a list of actions the government needed to take to promote gender equality in the RMI. One of these actions was the

ratification of CEDAW. In March 2005, the government conducted a forum addressing gender equality where the ratification of CEDAW was a central issue. To date, however, the RMI has not ratified CEDAW.

15. Vision 2018 was established in 2001 by the Marshallese government as a socio-economic road map for the country to achieve developed status. It refers to gender equality as a strategy to achieve this objective in several capacities. For example, it notes: "The strategies that will be implemented will be those aimed at providing equal job opportunities, equal access to education, better health care and family planning, ensuring better nutrition for women. Policies and programs will be pursued for the protection of women's rights including those relating to eliminating domestic violence, providing child support and protecting matrilineal land rights" (p 52).

16. The islands were governed under U.S. administration as part of the UN Trust Territory of the Pacific Islands for four decades from around 1947 and were given independence in 1986. As part of the independence agreement, the Marshall Islands and the United States entered into a Compact of Free Association, which contains economic and political agreements. Despite severe economic dependence on the United States, the agreement gave the RMI considerable political autonomy with full internal self-government and significant authority over foreign affairs, while the United States retains long-term "strategic denial" rights over the territory.

17. The government is the major employer, followed by the commercial and retail sectors. The construction industry is expanding, but there is limited domestic production, with the most significant sectors being fisheries, copra, handicrafts, and subsistence agriculture. The export base of the RMI is very narrow, with imports of US\$60 million far outweighing exports of US\$8 million in the fiscal year 2001 (Australian Department of Foreign Affairs and Trade 2003).

18. The Commonwealth Secretariat pilot initiative to integrate gender into national budgetary processes in Commonwealth countries was endorsed at the 1996 regular meeting of Commonwealth Ministers of Women's Affairs. See Commonwealth Secretariat (1999) and Elson (1999) for an overview of the specific projects completed and tools of analysis.

19. See the final report by Sharp, Vas Dev, and Spoehr (2003) for details of this framework.

20. In June 2006, WUTMI held a conference on civil society and the budget, which resulted in the production of a manual *A Guide to Applied Budget Analysis in the Republic of the Marshall Islands* funded by the Asia Foundation and the ADB. The manual was compiled primarily to provide the basic information and resources from which budget literacy training and lectures aimed at the civil sector could be developed in an effort to increase civil society understanding of budgets. The conference and the subsequent manual can be viewed as an important step in the accountability role of Marshallese women's NGOs that the GBI sought to promote.

21. Subsequent to the GBI, WUTMI has undertaken further capacity building in budget analysis with the Applied Budget Project. See [www.wutmi.org](http://www.wutmi.org) for further information about this project.

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