



Cabinet Office



**JAPAN**

Official Development Assistance



内閣府・外務省・国連開発計画(UNDP)共催シンポジウム報告書  
**ミレニアム開発目標達成のための戦略：  
ジェンダーの視点を取り入れた  
カクロ経済と予算のあり方**

Jointly organized by Cabinet Office, Ministry of Foreign Affairs and UNDP

Investing in Poor Women to  
Achieve Millennium Development Goals (MDGs):  
Engendering Macro-economics and Budgets



## □はじめに

### 西本 昌二

国連開発計画 (UNDP) 総裁補・開発政策局長

UNDP・日本WID基金(WID基金)を通じたジェンダー平等と女性のエンパワーメントの推進に対しては、日本政府と日本の皆様の寛大な支援を頂き、感謝申し上げます。

本報告書は、2006年7月31日に内閣府・外務省・UNDPが共催し、国際協力機構(JICA)と国際協力銀行(JBIC)の協力の下に開催された「ミレニアム開発目標達成のための貧困女性への投資：ジェンダーの視点を取り入れたマクロ経済と予算のあり方」の国際シンポジウムと、その翌日に開催されたワークショップの内容をまとめたものです。

本シンポジウムでは、予算やマクロ経済の中にジェンダーの視点を取り入れることがジェンダー平等とミレニアム開発目標(Millennium Development Goals: MDGs)達成を実現する重要な手段であるとし、このような政策をいかに推進していくかについて以下の論点にもとづいた議論が行われました。

- マクロ経済や予算はジェンダーに中立的か
- 中立でない場合、男性と女性とはどのように違った影響を受け、その違いは何に起因するのか
- ジェンダー平等とMDGsを効率的かつ公平に達成するためには、公共の財源をどのように有効活用すべきか

午前の部は、猪口邦子内閣府特命担当大臣(少子化・男女共同参画:当時)および佐藤重和外務省経済協力局長(当時)から開会の辞を賜り、この分野の第一人者であるダイアン・エルソン エセックス大学教授による基調講演のあと、WID基金がこれまで行ってきたジェンダー予算やマクロ経済のジェンダー主流化への支援案件のアプローチと成果について、案件実施国での取り組みも含めた報告が行われました。また、廣野良吉成蹊大学名誉教授からは、効用計算予算運用法(PPBS)の日本への導入の試みやUNDPにおけるご自身の経験を交えた総括説明がありました。

午後の部は、目黒依子上智大学教授のコーディネーションのもと、日本でのこの分野の牽引役である村松安子東京女子大学名誉教授、日本政府のGADイニシアティブの生みの親である岡庭健外務省経済協力局開発計画課長(当時)、エルソン教授、そしてUNDPのセリム・ジャハン貧困削減顧問を交えたパネル・ディスカッションが行われ、参加者の方々と活発な意見交換がありました。

翌日の「ジェンダー予算ワークショップ」では、UNDPから、UNDP全体で取り組んでいるジェンダー主流化の進捗状況やWID基金の実績とイノベーションの紹介が行われた後、村松名誉教授から「ジェンダー予算分析の概要」について詳細なレクチャー

一がなされ、最後に元・WID基金担当官である大崎麻子専門家から、政策ツールとしてみたジェンダー予算の様々な導入についてのレクチャーがありました。50人以上にのぼる参加者からは活発な質問が飛び交い、ジェンダー予算という新しい分野についての強い関心が伝わりました。

ジェンダー予算は、これまで社会分野にいわば「隔離」されていたジェンダー問題をマクロ経済に持ち込んだ非常に画期的なツールであり、アカウンタビリティ(説明責任)の向上やガバナンスの強化にも非常に有効です。すでに国際社会では、ジェンダー平等と女性のエンパワーメントの推進がMDGs達成に不可欠であるという認識が確立されつつあります。本シンポジウムとワークショップが、国際社会における重要なプレーヤーである日本の開発政策担当者、実施者、NGOや学界の方々にとってこのツールを今後活用していくきっかけとなることを強く望みます。

UNDPジェンダー・チームを統括する開発政策局長として申し上げたいのは、11年間にわたるUNDPと日本政府のジェンダー分野におけるパートナーシップは、今、新たな局面を迎えているということです。現在、日本政府のWID基金への拠出は、2003年に日本政府の拠出により新たに設立されたパートナーシップ基金の3分野の中の一つに統合されており、単独の拠出はありません。2002年まで続いた拠出金は、本年末には全て支出されます。2007年からは、現在運用中の案件の継続とパートナーシップ基金からの支援を続けつつ、WID基金自体は、徐々に規模縮小をし、2008年までには閉鎖することになっています。このような流れの中、パートナーシップ基金を通し、引き続き革新的な案件形成や実施を継続していくことになります。

他方、日本政府はWID基金を通し、過去11年間にわたり51件の国別プロジェクトを含む全世界72件のプロジェクトに対し、計1717万ドルの支援を行ってきました(2006年11月現在)<sup>\*1</sup>。ジェンダー予算という分野一つをとっても、すでに国・地域・グローバルレベルでの知見(ノウハウ・ツール等)が蓄積されています。最近では、WID基金は、世界サミットで取り上げられたジェンダー分野の課題について更なる取り組みも行っていますので、本基金で蓄積された、そして、今後もされていくであろう知見を、より広く日本の開発政策担当者と共に共有するような方策が講じられるべきでしょう。

最後に、11年間に及ぶ日本政府と日本の皆様の寛大な支援に対し、UNDPを代表して改めて深く感謝申し上げます。また、これまでWID基金を強く支え続けて下さいましたWID議連の皆様や、目黒先生はじめ、学界や専門家の皆様にも深く感謝申し上げます。本報告書により、本シンポジウムとワークショップにご参加いただけなかった方々にも、ジェンダー予算およびWID基金を通したUNDPと日本政府の過去11年間の強力なパートナーシップの成果について理解を深めていただければ大変幸いです。

\*1 詳細は、UNDP/日本WID基金10周年記念報告書(英語・日本語)をご参照：[http://www.undp.org/gender/japan/JWIDF\\_Report\\_10th-anniv.pdf](http://www.undp.org/gender/japan/JWIDF_Report_10th-anniv.pdf)

# プログラム

## オープニング・セッション

10:00～10:30 **開会の辞**

西本昌二 国連開発計画(UNDP)開発政策局長  
 猪口邦子 内閣府特命担当大臣(少子化・男女共同参画)、衆議院議員  
 佐藤重和 外務省経済協力局長

10:30～11:10 **基調講演**

ダイアン・エルソン エセックス大学教授、  
 レビー研究所ジェンダー平等と経済プログラム・コーディネーター

11:10～11:20 **質疑応答**

11:20～11:30 **休憩**

11:30～12:00 **基調報告** 「UNDP / 日本WID基金の支援によるジェンダーに配慮した  
 予算プロジェクト:アプローチと成果」

セリム・ジャハン UNDP開発政策局 貧困削減顧問

12:00～12:10 **質疑応答**

12:10～12:40 **フィールドからの報告** (UNDP/日本WID基金支援による地域別の  
 人材養成研修のフォローアップとして行われたイニシアティブの現場報告)

●ロザニータ・A・セラノ

フィリピン 女性とジェンダー研究所および北京+10に関するアジア太平洋  
 NGOフォーラム プロジェクト・コーディネーター

●カリタ・ジャン

国連開発計画(UNDP) コンサルタント  
 グルジア Iv. Javakishviliトビリシ州立大学教授

●ファトゥ・ディオウフ

セネガル 経済・財務省 専門家

12:40～12:50 **質疑応答**

12:50～13:10 **午前の部の総括とコメント** 廣野良吉 成蹊大学名誉教授

13:10～14:30 **昼食**

## パネル・ディスカッション:MDGs達成にむけて:ジェンダーに配慮した予算の活用

14:30～16:00 **モデレーター**:日黒依子 上智大学教授

パネリスト

●ダイアン・エルソン エセックス大学教授

●岡庭健 外務省経済協力局 開発計画課長

●村松安子 東京女子大学教授

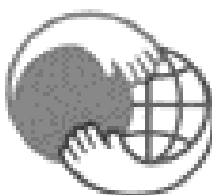
●セリム・ジャハン UNDP開発政策局 貧困削減顧問

16:00～16:15 **質疑応答**

16:15～16:30 **総括** 日黒依子 上智大学教授



内閣府



JAPAN



内閣府・外務省・UNDP 共催ワークショップ

「ミレニアム開発目標達成のための戦略：

ジェンダーの視点を取り入れたマクロ経済と予算のあり方」

協力：国際協力機構（JICA）、国際協力銀行（JBIC）

2008年8月1日（火）、於：UNハウス5階

2015年までに世界の貧困を半減させることを掲げた国際社会の共通の枠組みであるミレニアム開発目標（MDGs）達成のためには、貧困人口の大多数が女性であるという事実、さらにはその事実に必要な影響を与えている経済・社会構造におけるジェンダー格差の是正に取り組むことが必要不可欠となっています。そこで、昨日、内閣府、外務省、ならびに国連開発計画（UNDP）共催により「予算を含むマクロ経済の枠組みにどのようにジェンダーの視点を取り入れ、ジェンダー平等とMDGsを達成していくか」というテーマに関する国際シンポジウムを開催いたしました。本日は、「ジェンダーに配慮した予算」の基本的な概念と具体的取組みの事例や導入点に関するワークショップを開催いたします。

プログラム：

- |             |   |
|-------------|---|
| 14:00~14:30 | UNDP/日本 WID 基金：実績とイノベーションの紹介<br>西本昌二 国連開発計画（UNDP）開発政策局長<br>藤藤万里子 UNDP 開発政策局 UNDP/日本 WID 基金担当官 |
| 14:30~15:30 | 「ジェンダーに配慮した予算とは何か。ジェンダー課題達成のための手段となりうるか」<br>村松安子 東京女子大学名誉教授                                   |
| 15:30~15:45 | 質疑応答  |
| 15:45~16:00 | 休憩  |
| 16:00~16:30 | ジェンダーに配慮した予算：様々な導入点・活用事例の報告とトレーニング・マニュアルの紹介<br>大崎麻子 ジェンダーと開発専門家                               |
| 16:30~16:45 | 質疑応答  |

# プロフィール

## 西本 昌二

経済学博士号(経済学)  
国際開発学専攻

1971年にハワイ大学大学院で修士号(経済学)を取得。国際連合アジア太平洋経済社会委員会(ESCAP)、国際連合食糧農業機関(FAO)、アジア開発銀行(ADB)にて勤務。ADBではガバナンス政策や貧困削減戦略レポートなど、政策立案に従事。2002年より現職。大阪府堺市出身。

## 猪口 邦子

経済学博士号(政治学)  
政治学専攻  
国際開発学専攻

1982年にミーン大学で政治学博士号を取得。ハーバード大学国際問題研究所客員研究員、オーストラリア国立大学政治学部客員研究員、上智大学法学部教授を経て、2002年から2004年、東郷会議員日本政府代表団特別全権大使を務める。その間、軍縮会議(ジョージア)議員、国連第1回小型武器中間会合議員の要請を全う。2004年上智大学法学部教授に復帰。2006年日本学術会議会員。その他、行政改革会議等歴任。2008年10月、第3次小泉内閣に入閣。

## 佐藤 重和

経済学博士号(経済学)

1974年3月、東京大学法学部卒業。同年4月に外務省入省。1981年に経済協力開発機構協力員に就任以降、民間有償資金協力員、アジア局中国課長、大臣官房人事課長、アジア大洋州局副課長、在インドネシア日本国大使館公使等を歴任。経済協力局長として、2004年10月より現職。

## ダイアン・エルソン

オックスフォード大学教授  
ジェンダー平等センター学長と副学長  
アジア太平洋・アフリカ・ラテンアメリカ

専門はジェンダーと財政政策および女性の経済・社会的権利。近著には、『Human Rights and Corporate Profits: the case of the UN Global Compact in L. Basera and S. Bernath (eds.) Global Tensions: Challenges and Opportunities in the World Economy, London: Routledge, 2004』および『Engendering Government Budgets in the Context of Globalization』(International Feminist Journal of Politics, 6(4) December 2004)などがある。国連女性開発基金(UNFEM)顧問、国連ミレニアム・プロジェクトにおける教育とジェンダー平等に関する作業部会メンバーなどを歴任。

## セリム・ジャハン

経済学博士号(経済学)  
開発学専攻 国際開発学専攻

2009年より現職。現在、ミレニアム開発目標(MDGs)に基づいた国家開発戦略策定のための方法論やモデル構築、ならびにジェンダー平等などの貧困層に資する経済社会政策に関する研究の他、貧困削減戦略文書(PRGPs)を含む、MDGsに基づいた国家開発戦略に関する政策提言や国際機関間の協力活動に携わる。

## ロザニータ・ム・セラノ

フィリピン 女性ビジネス・研究員  
女性起業家支援センター所長  
アジア太平洋  
PRGPs  
2009年より現職

大統領府直属のナショナル・マニテナーである「フィリピン女性の役割に関する中央委員会」において、およそ15年間に渡り副委員長として従事。フィリピン政府と共に「ジェンダーに配慮した予算」イニシアティブを紹介し、また推進する役割を果たす。専門はジェンダー、人権および開発。経済学修士。

## カリタ・ジャン

経済学博士号(経済学) (2009年)  
アジア Pacific Development  
2009年より現職

マーケティングとジェンダー・経済学を専門とする。経済開発協会および社会経済開発のためのジェンダー協会の創立者兼代表。現在はUNICEFのプロジェクト「東コーカサス地域におけるジェンダーと政治」コンサルタントとして、「ジェンダーに配慮した予算」を推進。開発におけるジェンダー分野のプロジェクトにおける豊かな経験も有する。

## ファトゥ・ディオウフ

セネガルの経済学・国際開発学専門

貧困削減戦略文書(PRGPs)に関する質的フォローアップおよび参加を促進し、セネガルにおけるPRGPsの施行、ジェンダー協定者に関する報告書および市民社会のデータベース、ならびに門地内におけるジェンダーに関する質的指標のモニタリングを統括する責任を負う。また、UNFEM策定過程にジェンダーの側面を適用させると共に、セネガルにおける「ジェンダーに配慮した予算」実施の指揮も執る。

## 廣野 良吉

経済学博士号(経済学)

1960年米国シカゴ大学大学院経済学研究科卒業。日本経済協会エコノミストを経て、成蹊大学経済学部教授を務める(1973-80)。国際連合開発計画事業改訂評価局長(1987-99)、国際開発学会会長(1990-93)、東京大学大学院教授、政治研究大学院客員教授として務めたとる一方、外務省CCA懇談会委員、環境省中央環境審議会委員、世界経済協議会副会長、地球環境基金運営委員会委員等、政府顧問委員及び数多くの関係団体の理事も歴任。

## 目黒 依子

社会学博士号(社会学)

ウエスタン女子大学、東京大学大学院社会学研究科、タイス・ウエスタン・リザーブ大学大学院修了。社会学修士。1971年より上智大学専任講師、助教授を経て83年より教授。専門は社会学、ジェンダー研究。著書に『女性第一性支配の分析』『個人化する国家』『少子化のジェンダー分析』など多数。1997年より国連婦人の地位委員長日本代表。

## 岡庭 健

経済学博士号(経済学)

1984年3月、一橋大学法学部卒業。同年4月に外務省入省。国連代表官。在ザンビア大使館勤務を経て、1999年7月に国際社会協力部入植人道諒会議官に就任以降、国際研究開発室長、経済協力局国際機構課課長等を歴任。経済協力局開発計画課長として、2004年3月より現職。

## 村松 安子

東京女子大学経済学博士  
ジェンダー平等センター所長

国際協力機構(JICA)ジェンダーに関する諮問委員会委員、アジア開発銀行(ADB)ジェンダーと開発に関する外部フォーラム、日本フェミニスト・エコノミクス協会創立委員を務める。専門は開発経済学、とりわけジェンダーと開発。ジェンダーと経済学について多数の著書がある。レッドクリフ・カレッジ・パンデミック研究員フェロー、マサチューセッツ工科大学(MIT)国際開発学研究所アルプス・イノベーター研究員としての研究実績を持つ。

## □ オープニング・セッション



**猪口 邦子**  
内閣府特命担当大臣

本日は、本シンポジウム開催にあたりまして、共催する内閣府として一言ご挨拶申し上げます。私は、国際政治学の研究者として長年仕事をしてまいりまして、その中で多くの女子学生も教えてきました。男女平等の問題は私にとって、譲ることのできない決定的に重要な課題です。私は先の総選挙で転身を計り、政治家となる決意をして初当選を決め、2005年10月31日より内閣に参加することとなりました。先の総選挙においては、我が国において、多くの女性候補者が擁立され、その結果、憲政史上最多の女性の衆議院議員が誕生しております。ですから、我が国としてもいろいろな発展・進歩を遂げているところでございます。小泉内閣における大きな推進テーマである構造改革は、男女平等という社会改革を含みます。男女共同参画の専任大臣が任命されましたのは、我が国において初めてのことであります。そのこと自体、構造改革の不可欠なる一部として、男女平等を推進する社会改革があるということを示すことができると考えております。

私は就任して以来、まず我が国において、男女共同参画の基本計画を改訂することに奔走いたしました。そもそも基本法は1999年に成立しており、基本法が成立しますと、基本計画を政府としては策定する義務がございます。5年毎に改訂する必要があり、就任してまず、計画の改訂に全力をあげました。その中で、新たな課題として2020年までに社会のあらゆる分野において指導的地位に占める女性の割合が少なくとも30%になるよう取り組むという数値目標を入れることができました。これは政府の決定でございます。2020年まで30%というのは、多くの先進国から見れば十分ではないというご批判があるかと思えますけれども、我が国の実体を考えれば、このような数値目標を掲げ、2020年までありますから、若い世代も含めてしっかりと発展する余地を与え、そして確実に指導的地位に立ってもらいたいという希望が担当大臣としてございます。

また、私は取組みを徹底するため、国内において男女平等

の面で格差が発生しないよう全国10ブロックに分け、私がすべてのブロックを自ら訪問し、大臣による男女共同参画研修会を開催しました。これは、すべての行政職員、また地方議会の議員、また有識者などに対して、北海道から九州まで、東京だけでジェンダー平等は進むものではない、国家の中において格差ができないように努力する一環でもございました。また、我が国は少子化という問題にも直面しています。この背後には、男女共同参画、仕事と家庭を両立できるような女性や家族を支援する政策が不徹底であるという理由があると考えております。したがって、少子化対策としても、男女共同参画の推進は必要不可欠です。

また、我が国はアジアの中の国として、男女共同参画にこのような努力をしておりますが、共通の文化・考え方の中でいろいろ苦労している周りの国も多いのではないかと考えまして、東アジアの男女共同参画担当大臣を集めた会議を開催することいたしました。昨年未開催された東アジア首脳会議の参加国にお声がけをしたところ、全招待国から参加があり、2006年6月30日と7月1日に東京において開催されました。16カ国中14カ国が大臣クラスの参加であり、またUNDPとUNESCAPといった国際機関にも参加いただき、非常に有意義な閣僚会議を行うことができました。会議の最後には、「東京閣僚共同コミュニケ」を全会一致で採択いたしました。言うまでもなく、ジェンダー平等の推進はMillennium Development Goals (MDGs = ミレニアム開発目標) と密接な関係があるテーマでございます。また、世界大で見た時に、地域間のジェンダー・ギャップが発生することもよろしくないと思ひまして、東アジアが取り残されることなく、政治主動によって男女平等を進める一致した意思を表明し、また、ベスト・プラクティクス(取組みの優良事例)を共有する、あるいはどの国にあってもワーク・ライフ・バランスを重視する、というようなことを議論いたしました。

また、この会議におきましては、ナショナル・マシーナリー(国内本部機構)、つまり、国家としてジェンダー平等を推進するための本部が必要ですから、ナショナル・マシーナリーを強化する、また、女性のあらゆる職業における指導的地位への参画や、女性のリーダーシップが重要であるということ、また、どの分野でもジェンダー統計(ジェンダー・スタティスティクス)とその統計に基づきますジェンダー分析、そしてすべての政策がジェンダーの問題にどう影響をもたらすのか、という観点からのジェンダー・センシティブ・バジェットングが重要であり、そのような機能強化をする必要があることについて全会一致で合意しました。また、地域独特の、あるいは

その他の地域でもあるかもしれませんが、東アジアにおいて非常に憂慮されるべき女性や少女の人身取引、HIV／エイズ、自然災害といった新たな課題、そしてジェンダーの不平等という根深く残る問題について、地域ベースで協力体制を組むことが不可欠であるという合意をしたところです。

私は日本の担当大臣として、東アジア閣僚会議を一度でも開催することができるができればと思って始めたのですが、この会議の終わる頃、参加者はその会議を終えたくなかったのです。そこで、どうすればこの会議を終えないで済むかということを考えてくれたのです。そこで、この会議を年次会合とし、次々とホスト国が自分の責任の下でこのプロセスを継続させることを決定しました。したがって、来年はインドにおいて、そして2008年の第3回会合は韓国において開催されることになりました。また、今回の会合では日本が議長国でしたので、各国はそこで採択されましたコミュニケを主要国際機関に伝達することを議長である私に求めました。そこで、先般アメリカを訪問したときにニューヨークまで足を伸ばしまして、バルセナ国連官房長に閣僚コミュニケを含む関連文書を伝達したところがございます。その時、国連官房長からは「このような東アジアの取り組みは非常に注目すべきものであり、世界各地で地域単位の同様の取り組みをすべきである」というような発言がございました。また、そのようなことが可能になったときには、地域間で合同会議なども可能であろうと。世界規模のグローバル・プロセスも重要だけれども、このような地域ベースのリージョナル・プロセスがあってこそ、グローバル・プロセスは生きてくるという発言もございました。また、先般、OECD（経済協力開発機構）のグリア事務総長が来日されましたけれども、その際にも、このコミュニケを伝達したところがございます。

本日討議されるジェンダー・センシティブ・バジェットは、まさに男女平等を進めるときの次の段階にコアとなる重要な方法でございます。私が理解しておりますところ、2つの大きな柱があると思います。1つは、やはり女性部門、男女共同参画関係部門により多くの予算を配分するということです。それから、もう1つは、すべての予算項目が女性の立場の推進、そしてジェンダー間の格差を狭くしていくことにどういうふうに寄与するのか。そういう観点から立案され、実施され、また評価されなければならないと。今日は、専門家でいらっしゃるダイアン・エルソン先生のご指導のもと、さまざまな深い議論がされることを心から期待するものであります。我が国においても、このような観点を重視すべく、担当大臣として不退転の決意でこの分野の政策を進めることを申し上げ、私の挨拶とさせていただきます。ご清聴いただきまして、ありがとうございます。



**佐藤 重和**  
外務省経済協力局長

杉田 伸樹（外務省経済協力局  
審議官）による代読

私どもの局長佐藤がよんどころない事情で来られませんので、私がお挨拶を代読させていただきます。

猪口大臣、西本局長、ご相席の皆様、本日、内外の皆様の参加を得ましてUNDP・内閣府との共催により、本シンポジウムを開催するということを誠に喜ばしく思います。この機会に改めて西本局長をはじめとするUNDP、そして内閣府の方々のご努力に対して感謝を申し上げる次第でございます。先ほど、ご挨拶された猪口大臣、男女共同参画社会の実現にむけて、強いリーダーシップを発揮されておられるということで、このご努力に対して敬意を表するものでございます。

ミレニアム開発目標というのは、その主要な目標の1つとして男女平等の推進と女性の地位向上というものを掲げておるところでございます。たとえば開発途上国を中心として貧困に苦しむ11億人のうち、約70%が女性である。また、字の読めない成人のおよそ2/3が女性であるというふうに、今、言われているわけです。しかしながら、現状では社会・経済・政治の多くの面で依然として男女不平等が存在しています。こうした状況に対処するためには、世界各国が男女平等と女性の地位向上に向けて取り組まなければなりません。

こうした認識に基づきまして、2003年8月に改訂にしました我が国のODA大綱、これにおいて男女共同参画の視点の重視というものを基本方針の1つとして掲げているところがございます。そして、女性が開発活動に積極的に参加し、開発活動から利益を受けられるように十分配慮し、女性の地位向上に一層取り組むことを謳っております。大綱の方針に基づきまして、これまで我が国は開発途上国の女性支援イニシアティブ、通称WIDイニシアティブでございますけれども、これに基づき教育・保健・経済社会活動への参加の3分野を対象として女性の地位向上というものを積極的に支援してきております。しかしながら、男女平等を推進するためには、特定の分野において女性の地位向上を支援するのみならず、すべての活動において、男女に与える影響というものを考慮することが必要になります。



このような状況を踏まえて、我が国はWIDイニシアティブを一步進めてODA活動全般におけるジェンダー主流化を進めるため、北京女性会議の10周年にあたる2005年3月に、ジェンダーと開発イニシアティブ、通称GADイニシアティブですけれども、これを発表いたしました。この新しいイニシアティブでは、ODAの政策立案・計画・実施・評価にわたるすべての過程を通じて、また、貧困削減・持続的成長・地球規模の問題や平和の構築といったすべての分野において男女平等の視点を踏まえて活動を行うことを目指しております。

GADイニシアティブを実施に移すためには、多くの努力を必要としております。第1に、従来、女性に対して中立的と考えられてきた活動においてもジェンダーの視点を考慮するよう、ODA関係者の意識改革を図る必要があります。第2に、ジェンダー統計の整備やジェンダー分析の強化など、能力向上および体制整備を進める必要があります。

こうした努力の一環として、外務省では昨年11月に経済協力局幹部職員を対象としたジェンダー研修というものを実施しました。私も含めて大勢の職員が参加いたしました。6月には、東京と現地ODAタスクフォースをTV回線をつないで、遠隔セミナーを実施しました。また、本年秋には東京と現地ODAタスクフォースを結ぶ情報システムを立ち上げて研修材料等のジェンダー関連情報の共有を促進するという予定でございます。

こうしたGADイニシアティブの実施に向けた努力においては、ジェンダー関連活動において比較優位を有する国際機関、NGO等との連携というものを重視しております。特に我が国が95年にUNDPの中に設立した日本WID基金は、総額1,697万ドルに相当する71件のプロジェクトを通じて開発途上国におけるジェンダー主流化のための革新的な取り組みを支援し、大きな成果をあげてきました。本日のテーマになっているジェンダーに配慮した予算は、限られた国家予算を効果的に活用して、男女平等や貧困削減を実現するために重要な手段であり、WID基金は多くの国に対してこの分野で支援を行ってきております。WID基金による研修が直接の契機となり、たとえば、ネパール、ロシア、ボスニア、タジキスタンではジェンダーに配慮した予算の導入に向けた取り組みがすでに始まっているというふうに聞いております。我が国としても、こうした活動の成果を活用しながらGADイニシアティブの実施に努めていく考えでございます。

最後に本日の活発な議論を通じて、ジェンダーに配慮した予算をはじめとするジェンダー主流化の重要性について理解

が深まることを祈念して私の挨拶とさせていただきます。平成18年7月31日、外務省経済協力局長、佐藤重和。代読。どうもありがとうございました。

## □ 基調講演



**ダイアン・エルソン**  
エセックス大学教授



### Macroeconomics, Budgets and Gender

Diane Elson

Levy Economics Institute, USA  
University of Essex, UK

Panel.01

I would like to thank the Government of Japan and UNDP for inviting me to address this important meeting, and I would also like to congratulate the UNDP/Japan WID Fund for 10 years of support of wonderful work. I am looking forward in this meeting to learning from other colleagues around the world of the work that you have been doing, and to learn from our discussions here. It gives me particular pleasure to be in this symposium because I was a member of the Millennium Project Task Force on MDG3, Promote Gender Equality and the Empowerment of Women, and I see our discussions here today as an important contribution to that.

### Gender Neutral or Gender Blind?

- Macroeconomic policy is formulated in terms of monetary aggregates
- Unpaid Work is ignored
- Gender Division of Work is ignored
- Impact of macroeconomic policy is gender differentiated
- Neglecting gendered impact reduces effectiveness of policy

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Panel.02

I have been asked to talk about the intellectual framework for the work of gender-sensitive budgeting — to talk about macro-economics, budgets, and gender. First, the question of gender-neutral or gender-blind? Macroeconomic policy is formulated in terms of monetary aggregates: budget deficits, inflation, unemployment, economic growth — there is no mention of women there, and no mention of men either. In the formulation of macro-economic policy, unpaid work is ignored, and the gender division of work, both paid and unpaid, between women and men is also ignored. But the impact of macro-economic policy is gender differentiated. I will show you some examples in a moment. Neglecting gendered impact reduces the effectiveness of policy.

### Gender-Aware Conceptualization of the Macroeconomy

- Unpaid Work as well as Paid Work
- Care Economy
- Production of Labor Power as well as Commodities
- Four Sectors: Business Sector, Public Sector, Household Sector, Non-Profit Sector

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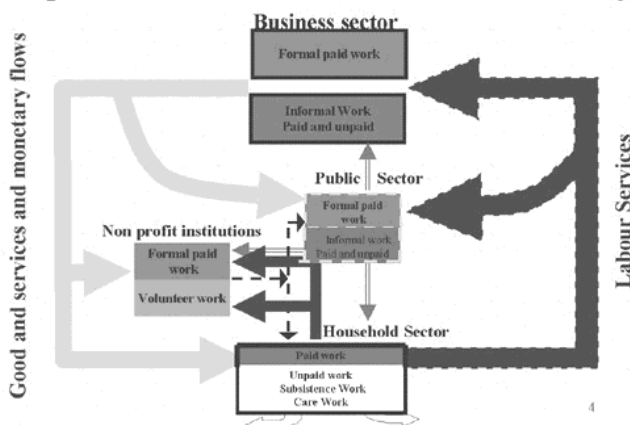
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Panel.03

We need to develop a gender-aware conceptualization of the macro-economy, one that looks at unpaid work as well as paid work, unpaid work consisting partly of the work of caring for other people that contributes to

what some now call the "care economy." Of course, the care economy also comprises paid work done by nurses, childcare providers, people who are caring for elderly people. But the care economy is particularly important from the point of view of human development. Gender-aware conceptualization of the macro-economy also looks at the production of labor power, as well as the production of commodities. It does not take the availability of a labor force able to work for granted; it looks at the social and economic processes by which people capable of working factories, fields, offices, schools, etc., are produced. In developing gender-aware conceptualization of the macro-economy, I have divided the economy into four sectors: the business sector, the public sector, the household sector, and the non-profit sector.

### Unpaid Work and the Market Economy



Panel.04

Now, I am going to put up a diagram which summarizes the key relations between these sectors. This diagram is a little complicated at first sight, and I do not have time to go into all the nuances of it. I just first want to draw your attention to these four sectors. These arrows provide a summary of the relations between these sectors. Here is the household sector, producing labor services which supply the public sector, the business sector, the non-profit institutions, with a workforce. Here is the business sector, providing goods and services and monetary flows like wages and salaries and tax payments to the public sector, to the non-profit institutions, and to the household sector. Here is the public sector, very important for our topic of gender-sensitive budgeting. The

arrows here show it providing services net of taxes that it levies on the other sectors, in order both to redistribute income, addressing poverty, providing infrastructure, and providing public services of many kinds. Here is the non-profit institution, also providing services to the other sectors, both services in the form of caring services, educational services, and also advocacy services, helping people to understand what their rights are and how they can claim them.

In all of these sectors, work goes on. I have tried to highlight here the difference between the paid work and the unpaid work that goes on, particularly wanting to draw your attention to the unpaid work that goes on in households, producing, through subsistence work and through care work the labor force for the rest of the economy. The unpaid volunteer work that goes on in non-profit institutions to provide their services, increasingly in the public sector we are also finding some unpaid work being done by volunteers who help to keep the public service running. And in the business sector, another kind of unpaid work — the unpaid work that is done in family enterprises, both family farms and small family businesses producing manufactures and services, in which junior members of the household and female members of the household provide unpaid work to enterprises run under the direction of the senior men in the household. I am arguing that if we really want to have an economic policy that is going to support the achievement of the Millennium Development Goals (MDGs), we need to take account of this unpaid work. We both need to recognize it in our public policy, to count it, and we also need to be aware that it is not available in unlimited quantities. If you have an economic crisis, if you have a health crisis like HIV/AIDS, the household sector and the unpaid work in the household sector is always called upon to provide the safety-net of last resort, but its ability to do this is not unlimited, and these little arrows here signify the leakages of human capabilities that come when the household sector is overburdened: there is malnutrition, there are people dropping out of school. In the limit, life expectancy falls and people die.

We should recognize the important role of unpaid work in the household sector in underpinning all of our economies, and in providing the ultimate safety-net, but we should not expect it to be able to do this in an unlimited way. We need to think about the way in which the household sector needs that critical support from the public sector, needs that critical support from the non-profit institutions, and needs the business sector to recognize the importance of the households in producing their key resource of workers for the future. We should not think of people who are parents as liabilities as workers because of their domestic responsibilities, but rather as people who are producing the workforce for the future. I was pleased to hear in the opening remarks recognition of the role of households in doing this, and the problems that arise for the business sector when fertility falls too low.

### Accounting for Unpaid Work

- Time spent: time use surveys
- Monetary valuation: satellite accounts

Panel.05

I mentioned the issue of accounting for unpaid work. There are two ways of doing that. One is looking at the time spent using time-use surveys. Second is putting a monetary valuation on the time spent, and constructing a satellite account that will sit alongside the conventional national accounts that measure the Gross Domestic Product (GDP) of a country. I am pleased to say that since the Beijing Meeting in 1995, much progress has been made around the world in conducting time-use surveys and putting a monetary values on this and constructing satellite accounts. I can only have time for three examples of this; I am sure there are many others represented by countries that have people form them in this room.

### Monetary Valuation of Unpaid Work Value of unpaid work excluded from GDP as percentage of GDP

UK	77% (output method, gross value-added by households as % of GDP minus imputed rent)
South Africa, 2000	11% to 50% (input method, varying wage rates)
India, 1998/9 (for 6 states)	26% to 50% (varying by state) (input method, global substitute wage)

Sources: UK: Office for National Statistics, South Africa: Bullendar and Brithaug, 2005 India: Chakraborty, 2005  
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Panel.06

First, the monetary valuation of the unpaid work, the value of the unpaid work that is excluded form the GDP as a percentage of the GDP. I have examples from three countries here: the United Kingdom, from which I come, South Africa, and India. They have all done this. There are different ways of doing this, and I do not have time to go into the details. The different ways of measuring the output and inputs and putting a money valuation on them give rise to different figures. In the UK, we use a method that produced a particularly high figure, 77%. That is because we have a very wide definition of unpaid work, and we value it at the cost of employing professional workers who would provide those services, what it would cost to hire a professional worker to do them. South Africa and India, their upper figure is 50%; their lower figure is 11% or 26%, and that is largely because they have a more restricted definition of this unpaid work, and they have different ways of valuing it. These upper figures, however, I think, represent the best way of valuing it, which again is not to value it at the minimum wage, but to value what it would cost if you had to hire a professionally-trained nanny, a professionally-trained cook, a professionally-trained housekeeper, even at times a professionally-trained child psychologist, and then you get these figures of 50%. It is not a small amount, it is a large amount.

## *Unequal Division of Unpaid Work*

### *Average Minutes per Day by Sex*

	Total	Male	Female	F-M
UK	282	202	318	116
South Africa	154	80	220	140
India	160	31	297	266

Sources: UK: Calculated from Short, 2000, Table 2 South Africa: Budlender and Brahaug, 2005, Table 2  
India: Calculated from Chakraborty, 2005, Table 3  
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#### Panel.07

Then I want to draw your attention to the unequal division of unpaid work. Again, with examples from these three countries, looking at the average minutes per day by sex paid in unpaid work. I want to draw your attention to this last column: this is the gap between what females spend and what males spend. Females in all of these three countries spend more. It is largest in India, the poorest of these three countries. It is reduced somewhat in South Africa, which has a higher per-capita income than India. It is less in the UK, but it is still substantial in the UK. This is not a gap that we can expect will be eliminated as development takes place. It still persists, and I think the figures in Japan would show a gap here too.

## Disadvantages of Specializing in Unpaid Work

- Concentration in informal paid employment
- Feminization of poverty
- Lack of time for education and further training
- Lack of time for participation in public life

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#### Panel.08

There are disadvantages to specializing in unpaid work. It is women and girls who specialize in unpaid work. At the same time, they are trying to do paid work, particularly poor women, because their families cannot survive without them doing paid work. But their

responsibilities for unpaid work mean that they are concentrated in the informal areas of paid employment, where wages are low, where employment is precarious, and where there is a lack of social protection. This leads to the feminization of poverty. Feminization of poverty means not only poverty for women, but poverty for their families. It also means lack of time for education and for further training, and lack of time for participating in public life, in serving as an elected representative, in serving on the boards of non-profit institutions.

I was interested to hear the Minister for Gender Equality talk about the target in Japan now for 30% of these important positions in public life to be held by women. I congratulate Japan on this. I think it is a better target than we have in the UK at the moment. This is very good, but in order to do this, women need time. If women are specializing in unpaid work, they very often do not have the time to do this.

## **Budgets have a Gender Dimension: Expenditure**

- Fiscal retrenchment tends to reduce provision of the public services that are especially important in reducing poor women's unpaid work
- A reliance on community contributions of unpaid work in the delivery of public services tends to disproportionately decrease the free time of poor women
- A lack of procedures that take account of women's priorities leads to underfunding of key policies for gender equality eg policies to reduce violence against women
- Failure to take account of gender in sectoral programming leads to productivity losses eg services for farmers

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#### Panel.09

Now I want to turn to the budget. The budget brings together the revenue and the expenditure of governments, and it is a key way in which the public sector relates to those other sectors of the economy. I want to suggest to you that budgets have a gender dimension. At first, the expenditure side. I think we have seen around the world that fiscal retrenchment, that is to cut back public expenditure, has tended to reduce the provision of public services that are especially important in reducing poor women's unpaid work. Sanitation, clean water, education, health, social

welfare services, care services — they very often have been disproportionately hit by fiscal retrenchment. Second point is that there is a growing reliance on community contributions of unpaid work in the delivery of public services, both for constructing local infrastructure and for the continuing operation of those services. Cleaning the schools, for instance, volunteering in the classrooms, helping to run social welfare services. This reliance tends to disproportionately decrease the free time of poor women, because it is poor women who are particularly called upon to make these contributions in order to access public services. This is a hidden subsidy that poor women are providing to the public budget.

In many countries, there is a lack of procedures that take account of women's priorities. This leads to under-funding of key policies for gender equality. For instance, policies to reduce violence against women. Since 1995, many governments have introduced very good new laws to combat violence against women. Very often, however, they have failed to make the resources available to fully implement those laws. There have been no procedures that prioritize this in the making of budget decisions.

Finally, failure to take account of gender in sectoral programming of all kinds leads to productivity losses. Lots of examples show how failure to take gender into account in providing services to farmers leads to losses of productivity in poor countries where the majority of poor farmers are women.

## Budgets have a Gender Dimension: Revenue

- An increase in sales tax tends to disproportionately increase the unpaid work of poor women
- User fees for education tend to have a disproportionate impact on girls' enrollment in school
- Willingness and ability to pay for infrastructural services depends on distribution on income within households

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Panel.10

The revenue side of budgets also has a gender dimension. An increase in sales tax tends to disproportionately increase the unpaid work of poor women. This is because poor women will be called upon to increase their unpaid work to substitute for buying goods in the market if goods in the market become more expensive as a result of an increase in a sales tax. User fees for education tend to have a disproportionate impact on girls' enrollment in school. If poor families find it hard to meet user fees for educating their children, they tend to give priority to the education of boys. Willingness and ability to pay for infrastructural services, such as water and sanitation, depends on the distribution of income within households, because households all over the world very often do not pool and share all of their resources. Separate income streams are kept by women and men, and different things have to be paid for out of those incomes. Women may very much want to have an increase in sanitation services to their households, but they lack the ability to pay for it, because they do not command all of the resources in the household and all of those resources are not pooled and shared.

## Gender Sensitive Budgeting

Not just a focus on projects and programmes for women. A gender-based assessment of budgets, incorporating a gender perspective at all levels of the budgetary process and restructuring revenues and expenditures in order to promote gender equality.

It also assists in the achievement of various other objectives:

- Efficiency
- Effectiveness
- Transparency
- Accountability

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### Panel.11

Now let me turn briefly to gender-sensitive budgeting. I have just reinforced the point that has already been made, that this is not just a focus on projects and programs for women; it is a gender-based assessment of budgets, incorporating a gender perspective at all levels of the budgetary process, and restructuring revenues and expenditures in order to promote gender equality. It also assists in the achievement of various other objectives: efficiency, effectiveness, transparency, and accountability. I think we are going to have some specific examples of this later today.

## Different practices, common principles

- Not just one way to implement GSB
  - A variety of tools and procedures
- Select according to context and objectives

Underlying the diversity, one basic question.

Does the way the government raises and spends money:

1. Reduce gender inequality
2. Leave gender inequality unchanged
3. Increase gender inequality

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### Panel.12

There are different practices in gender-sensitive budgeting, but there are some common principles. We do not believe that one size fits all in gender-sensitive budgeting. There is not just one way to implement a gender-sensitive budget. There are a variety of tools and procedures, and we need to select according to the context and according to the objectives. But underlying the diversity, there is one basic question: does

the way that the government raises and spends money reduce gender inequality, leave gender inequality unchanged, and/or increase gender inequality?

Any of these three things may happen not because the government intended they should happen, but because the government did not examine the likely impact of its measures on gender equality, and its measures can have unintended, as well as intended, consequences.

## Some Clarifications

- GSB does NOT imply that 50 per cent of tax revenues should be paid by males and 50 per cent by females, because women's incomes are lower than men's
- GSB does NOT imply that 50 per cent of spending on EACH programme should accrue to females and 50 per cent should accrue to males, because women and girls and men and boys are present in different proportions in the groups relevant to different programmes
- GSB does not necessarily have to cover every item of expenditure and revenue, but it should not be confined to social sectors. It is relevant for infrastructure and economic sectors too.

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### Panel.13

Three brief clarifications of three confusions I often find. Gender-sensitive budgeting does not imply that 50% of tax revenue should be paid by males and 50% by females. That is because women's incomes all over the world are lower than men's, and we all agree that taxation should be related to ability to pay. Gender-sensitive budgeting does not imply that 50% of spending on each program should accrue or benefit females and 50% should accrue to males, or benefit males. This is because women and girls and men and boys are present in different proportions in the groups, relevant to different programs. In some cases, 50% to each is a good benchmark. In other cases, we would expect more than 50% to go to women, and that would be for instance in programs to address poverty in countries where more than 50% of poor people are women. On the other hand, in some cases, we would expect less than 50% of the spending to accrue to women, because women are less than 50% of the relevant group. People wishing to set up small businesses. Women are typically in a minority, not 50% of this group. We would not therefore expect

50% of all of the expenditure on programs to support people setting up small businesses to accrue to women. We might, however, suggest that the government should examine the reasons why women are less than 50% of the people who are wishing to set up small businesses, and consider whether it needs a programs to address that. Gender-sensitive budgeting does not necessarily have to cover every item of expenditure and revenue. That is a very ambitious task, but it should not be confined to the social sectors, like health and education. It is relevant for infrastructure and economic sectors too.

## LOCATION OF GSB

- National
- Sub-National
- Inside Government
- Outside Government
- Collaborative efforts
- Developing Countries
- Developed Countries

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### Panel.14

I now would like to briefly speak about the location of gender-sensitive budgeting. It can take place at the national level and address the national budget, but also at sub-national levels, at budgets for provincial and for municipal and village-level entities. It can take place inside government, and we hope that the Ministry of Finance, as well as the Ministry for Gender Equality will play a key role in this. It can also take place outside government, as non-profit institutions bring together people to do research and to lobby and advocate for gender-sensitive budgeting. Some of the most fruitful examples of gender-sensitive budgeting have involved collaborative efforts between those inside government and those outside government. This process of collaborative dialogue, in which elected representatives often play a key role, is an important one to bear in mind.

Gender-sensitive budgeting is taking place in

developing countries, and in transition economies. We are going to have some examples of those later today. It is also taking place in developed countries. There has been a big growth in Europe of gender-sensitive budgeting. The Nordic countries are having a conference in November at which they will report on the efforts at gender-sensitive budgeting in the Nordic countries. France has also introduced an initiative; there has been some work in Ireland and in the United Kingdom, and there are other examples too. I think this is an important area of mutual learning between developing and developed countries. I have always learned a lot from the initiatives that have been taking place in developing countries about what we can do in developed countries, and I think it is very important to find and nurture these areas of mutual learning.

## Some results of GSB

GSB initiatives contribute to improving **budget transparency and government accountability** for its gender equality and poverty reduction commitments and **efficiency, equity and effectiveness** in programs and their resource allocations. For examples see Elson and Sharp 2006

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### Panel.15

A brief mention of some results of gender-sensitive budgeting. I know the donors among you will always be asking about what are the results of this. I would argue that gender-sensitive budget initiatives contribute and have contributed to improving government budgets in a number of areas. To improving budget transparency and government accountability, both for its gender equality commitments and for its poverty-reductions commitments, and commitments to achieve the Millennium Development Goals, and also for the efficiency, equity, and effectiveness in programs and in the raising and allocation of resources. A number of examples of this are documented by myself and the Australian gender budget expert, Rhonda Sharp, in a note that I have given to colleagues in UNDP. I only



have time here to draw attention to a few of these.

One is improving indicators of outputs and outcomes. The MDGs, of course, give us high-level indicators of what we want to achieve. Then in relation to budgets, we need more detailed indicators of outputs and outcomes. All over the world, however, governments are trying to move in the direction of results-based or performance-based budgeting, where they relate the revenues they raise and the expenditures they make not just to keeping the government machinery ticking over, but to achieving particular targets, and to measuring that achievement through indicators.

### Improving indicators of outputs and outcomes

- The UK government adopted gender sensitive target setting (an increase from one gender sensitive target out of the initial 170 targets to half a dozen gender sensitive targets across a wider range of issues and agencies).
- The government of Rwanda incorporated input from a gender budget consultant to improve its indicators in its move to performance oriented budgeting .
- The Samoan youth-gender sensitive budget pilot initiative led to the removal of inappropriate output indicators (such as a clean ministerial car for the women's ministry) from the budget documents.

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#### Panel.16

Gender-sensitive budgeting can lead to improving those indicators of outputs and outcomes through using gender-sensitive indicators. In the UK, for instance, the government has adopted gender-sensitive target-setting under pressure from a non-profit institution to which I belong called the UK Women's Budget Group. We have analyzed the initial 170 targets and found that there were not enough focused on gender-sensitive targets. In the first instance, we were able to persuade the government to move from one gender-sensitive target to half a dozen gender-sensitive targets, and now I am pleased to say that since 2004, the government has now got a wide range of gender-sensitive targets, and is issuing a report on how far it is meeting those targets. In Africa, the government of Rwanda incorporated input from a gender-budget consultant to improve its indicators in its move to performance-oriented budgeting. I think

we will be hearing about other examples later today. Gender-sensitive budgeting can also lead to the removal of inappropriate indicators. An example from Samoa, where the youth- and gender-sensitive budget pilot initiative led to the removal of an inappropriate output indicator, such as a clean ministerial car for the Women's Ministry, from the performance indicators. This is not because they thought that the women's minister should have a dirty car, but they thought that it was important to have performance indicators that related to the lives of poor women in Samoa. These kinds of things happen because people are very often confused, and that is why we need the kind of training that the UNDP/Japan WID fund has been supporting.

### Improving the use of budgeted expenditures through tracking studies

- GSB research in India showed how a major poverty alleviation programme was failing, even though over 90 percent of beneficiaries were women. The research made several recommendations on how the programme could be improved.
- GSB research in Brazil on health programmes showed low implementation and disbursement rates and the limited social impacts. Armed with the information, women's organisations advocated for improvements in budget allocations and disbursement and were met with a positive response from the government . The Ministry of Health agreed to develop a joint methodology for analysis and to refine monitoring tools and committed itself to make additional budget information available to the public.

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#### Panel.17

You can also improve the use of budgeting expenditures through tracking studies that are gender-sensitive. These are studies that track the money, that follow the money, from the government budget appropriations through all the different tiers and levels of government to the villages, to the towns, to see how they are affecting the people who are supposed to benefit. Gender-sensitive budget research in India showed how a major poverty-alleviation program in the state of West Bengal was failing, even though 90% of the beneficiaries were women. I do not have time to go into the details, but the research then made several recommendations on how the program could be improved. Gender-sensitive research in Brazil on health programs showed low implementation and disbursement rates and limited social impacts. Then, armed with this information, women's organizations

advocated for improvements in budget allocations and disbursement. There were met with a positive response from the government. The Ministry of Health then agreed to develop a joint methodology for analysis, and to refine monitoring tools, and it committed itself to make additional budget information available to the public. These are important tools for improving transparency and accountability and the effectiveness of budgets.

## Improving design of taxation

The South African civil society women's budget initiative undertook an analysis of indirect taxation and identified taxes on necessities such as paraffin as particularly regressive for women.

The annual government revenue loss of a zero VAT rating for paraffin was estimated and it was argued that a zero rating would be a well-targeted form of assistance to poor households and of little benefit to rich households as they did not use paraffin very much. Subsequently the tax on paraffin was removed.

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### Panel.18

Gender-sensitive budgeting can also help improve the design of taxation. I have got one example from South Africa, where there has been a very important civil society women's budget initiative, working in cooperation with government. It undertook an analysis of indirect taxation. It identified taxes on necessities such as paraffin, which is a fuel oil. Tax on this fuel is particularly regressive for women. Poor women use this fuel every day for cooking, and they are the ones who have to pay for it out of their earnings. The initiative also estimated that if this fuel were to be given a zero rating in the Value-Added Tax (VAT) system, there would be some loss of government revenue but it was argued that nevertheless this zero rating for paraffin would be a well-targeted form of assistance to poor households, and it would be of little benefit to rich households, as they did not use paraffin very much. In other words, abolishing this tax would be a very good form of support for poor households. This gender-sensitive research was persuasive, and subsequently the tax on paraffin was removed.

## Capacity building of elected representatives

The Ugandan NGO women's budget group (Forum for Women in Democracy) produces briefings and papers for parliamentarians which have given gender issues 'credibility and respect' rather than having them discussed as 'sentimental or moral issues'.

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### Panel.19

Capacity-building of elected representatives is another important area for gender-sensitive budget initiatives. Elected representatives at all levels play a critical role in approval of the budget and in scrutiny of the budget, and are able to play an important role in holding the Ministry of Finance accountable. Just one example here of many: In Uganda, Women's Budget Group, the Ugandan NGO, organized through the Forum for Women in Democracy, produces briefings and papers for parliamentarians, which provide a gender-sensitive analysis of the Ugandan budget. According to a leading former member of parliament in Uganda, the production of these briefings and papers have given gender issues "credibility and respect among parliamentarians," rather than having them discussed "as sentimental or moral issues." I am told by colleagues in Uganda that the production of these briefing papers enabled male members of parliament to feel comfortable and knowledgeable about raising gender-equality issues in relation to the budget.

## Conclusion

The ways in which governments raise revenue and allocate expenditure can be improved by recognizing the gender dimensions of fiscal policy.

Outcomes for gender equality, poverty reduction and other objectives can be improved by using GSB.

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Panel.20

Let me conclude. The ways in which governments raise revenues and allocate expenditures can be improved by recognizing the gender dimensions of fiscal policy. Outcomes for gender equality, poverty reduction, and other objectives can be improved by using gender-sensitive budgeting. We are going to hear later today many detailed examples, and it is of course particularly important to focus on this in the context of the Millennium Development Goals — critical, ambitious goals. There is a shortage of resources, and we have to use them as effectively as we can, as is also an important issue in developed countries, which also do not have unlimited resources. The ways in which those resources are prioritized and the effectiveness with which they are used is important. I think gender-sensitive budgeting is a tool that can benefit governments from all around the world, and can help them close the gap between legislation, plans policy documents, and the raising and use of resources. Thank you.

### □ 質疑応答

**会場からの質問1:** 先生が今までご研究なされた中で、ジェンダー・センシティブ・バジェットが行われている地域、あるいは国々におきまして、何が最もそれを成功させる条件だとお考えですか？例えば、ジェンダー予算という考え方がコミュニティあるいは社会で浸透するためには、やはりそのコミュニティの人々自身がある程度の教育水準を達成していなくてはならないでしょうし、この問題に対するセンシビリティをコミュニティを代表する政治家たちが持たなくてはいけないのではないかな、

とも思います。地域の教育水準や経済活動などといったものとかかなり関係しているかな、と思うのですが、いかがでしょうか。

**ダイアン・エルソン教授:** This is a very good question. Political will is obviously important. It is important that the Ministry of Finance take some responsibility for this, and not see it as only an issue for the Ministry for Women. It is important that there should be collaboration between the Ministry for Finance and the Ministry for Women and all of the other important ministries. I think collaboration between politicians, officials, and NGOs on this topic is also important. NGOs can mobilize research and can draw upon professors — I know that in Japan you have many eminent professors here today working on these issues, who have expertise to contribute — also the expertise that there is in women's organizations, looking at issues confronting particular groups of women because of course our focus is gender equality but that can mean different things for different groups of women. Drawing upon that range of expertise from civil society organizations and making that available to governments so that there is regular dialogue between the Ministry of Finance, Women's Ministry, and civil society organizations working on budget issues is important. The role of the national statistical office is important in promoting the use of gender-sensitive indicators. I think all of those things are important. I think it is also important to have particular objectives in mind. I always ask people, "What particularly do you want to achieve through having this gender-sensitive budgeting work?" In some countries, it can be damage limitation. One impetus for introducing gender-sensitive budgeting was to ensure if there were expenditure cut-backs, these would not fall most heavily on the services most important for poor women. Or if there is a change in the taxation system, this will not have measures that fall most heavily on poor women, or which discourage and discriminate against women from participation in the labor market. Sometimes it is to ensure that resources are mobilized to address particular objectives, and the Millennium Development Targets is a good case in point. I know that in Mexico work on gender-sensitive budgeting has, in the first instance, particularly focused on the issue of maternal health and the MDG goals in relation to maternal health and the poorest women in Mexico.

## 質問2: Can you clarify what VAT means?

(VATとは何でしょうか?)

**ダイアン・エルノン教授**: VAT is the abbreviation for "value-added tax," which is a kind of sales tax which is very popular — well, popular with governments, not always popular with the citizens — and is being introduced around the world. It is very popular with governments because it is an effective way of raising revenue. But it is a regressive tax, in the sense that the burden of that tax, the incidence of that tax, falls most heavily on the poorer households than the richer households, and less great care is taken in the design of the tax. I was interested to see recently how this kind of tax has been designed in Kenya to try to avoid those issues. What they have done is exempted the basic necessities consumed by the poorest families from this tax so that it becomes less regressive. That is particularly important for poor women because it is poor women who have the responsibility each day for buying the basic necessities for their family, and on which the VAT tax would raise the prices unless the government exempted those goods from the tax.

**質問3**: 先ほど猪口大臣から、日本の議員の数は憲政史上最大だという話があったのですが、世界のランキングからいうと132、133位ですね。その事実を忘れてはならないと思います。財務省のジェンダー主流化というのは、日本では非常に難しいと思います。そこで、個別の事業、あるいは個別のテーマから入っていくというのがどこの国でもスタート地点になるのかな、ということを考えています。特に、日本でこの問題を研究する場合はそう言えると思います。全収入、それから歳入・歳出についてトータルにジェンダー分析を行った事例は国際的に見てあるのでしょうか。

**ダイアン・エルノン教授**: This is a very good question. Gender-sensitive budgeting does not require governments to change the procedures, by which they manage their finances. It does not require the budget office to change the whole way it does things. What I think it does do is that it requires the Ministry of Finance to look carefully at the gender impact of its tax measures and its expenditure measures. I always encourage the Ministry of Finance to begin by looking at the gender impact of changes that it is going to make. It is always easier to

introduce new thinking when people are already thinking about changes. It is much easier to get the Ministry of Finance to think about the gender implications of taxation when it is going to make a change, or the gender implications of expenditure when it is going to make an important change in the allocation of resources. I think changes are entry points — when there is reform of the budget process, as there is in many countries — to move towards performance-oriented budgeting. I think that that is an important opportunity. Different countries have done this in different ways because they are making different kinds of changes and because the way that budgets are presented to parliament, for instance, is different in different countries. I do think that things need to be tailored according to the specific circumstances of different countries but I do think there is always something that the Ministry of Finance can benefit from participating in this process.

**質問4(西本昌二)**: I would just like to follow on the last point. I think it very important. Within the institutions such as UNDP, there is always a challenge of whether you first look at the individual project or programme-level analysis and try to scale it up, and/or you look at implications of certain goals at the macro or national level, and try to bring it down to the community level. To my mind, I think both are important because we are gathering here to look at macro-policy and budgeting, which if you look innocently, they are not really gender-responsive. I think there are a lot of examples of projects we share hopefully in the course of the day. We will share the experience of how the results-based budget at the programme and project level can be improved upon. What is perhaps missing as a long-term goal is to make the entire public expenditure exercise to be much more gender balanced. I think they are both very important.

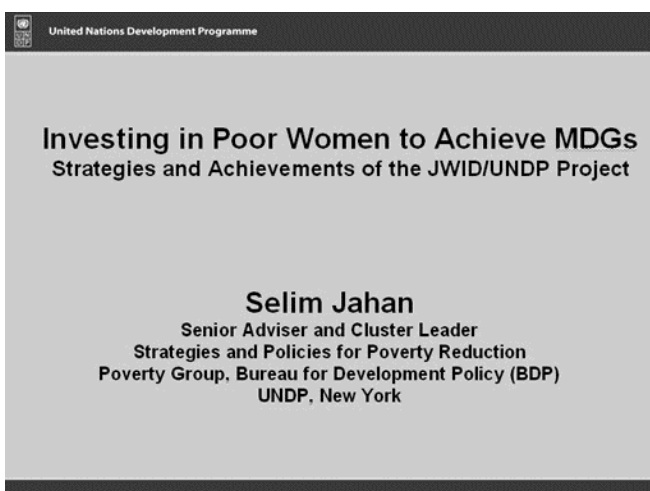
**ダイアン・エルノン教授**: I fully agree. I think that is very important. When you use tools like tracking expenditure, you are indeed linking the budget with particular programmes and projects, and their impacts at the grassroots.

## □ 基調報告

「UNDP/日本WID基金の支援によるジェンダーに配慮した  
予算プロジェクト: アプローチと成果」

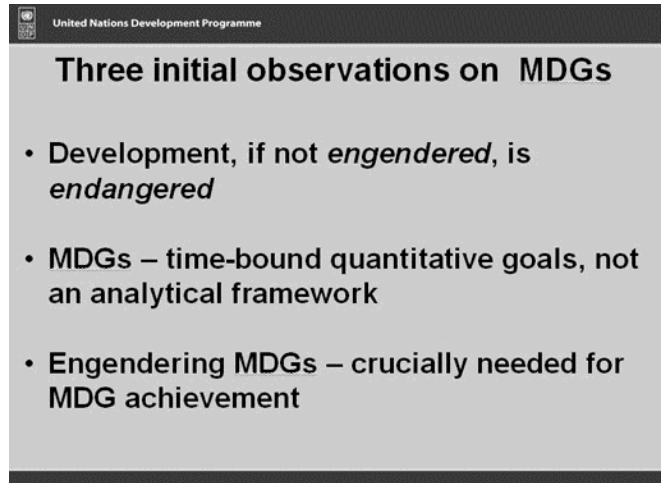


**セリム・ジャハン**  
UNDP開発政策局 貧困削減顧問



Panel.01

Thank you very much. First of all, I would like to thank the Government of Japan and my UNDP colleagues for inviting me to this seminar, which is quite important. I am also pleased to meet again my good friend Diane Elson, after quite some time. I think Diane's presentation has made an overall framework, into which I would like to couch my presentation, basically "Investing in Poor Women to Achieve MDGs: Strategies and Achievements of the UNDP/Japan WID Fund supported projects."



Panel.02

If I may start with three initial observations: first, I think about 10 or 11 years ago when we did the Human Development Report 2005, I wrote a simple line that "development, if not engendered, is endangered." A very simple statement, but with far-reaching implications. In whatever way you define development, whether in terms of economic growth, whether in terms of industrialization; whether you try to limit in terms of a certain set of quantifiable targets, still the validity of this particular statement cannot be overemphasized.

The second observation is that MDGs, by themselves, let us make no mistake, do not constitute any analytical framework. MDGs are basically a set of time-bound, quantitative goals. The analytic framework of MDGs is provided by the human development paradigm, and the MDGs are very much anchored into the structure of human rights.

The third observation is engendering MDGs: this is crucially needed for MDG achievement. When we are talking about engendering MDGs, we are taking a very comprehensive view to it. It should start with taking the issue of goals, indicators, and data through a gender lens. It also means that we should think of policies and strategies which are gender-responsive. It also means that we should have resources, budgeting, and costing that should take care of the gender-sensitiveness of the MDGs. It is more of a comprehensive approach when we are talking about engendering MDGs. That is the first issue.

The second issue is that the engendering of MDGs is absolutely crucial for the achievement of MDGs at the national level. For example, if in a particular country 70% of poor people are women, it does not matter whatever policies and strategies you undertake unless you have very targeted interventions for those pockets of deprivation. Believe me, at the average level, at the national level, MDGs will not be achieved. Therefore, looking at MDGs through a gender lens and concentrating on initiating targeted interventions for those pockets of deprivation where women are the majority is a requirement for the achievement of the MDGs.

The third observation with regard to this third point is that sometimes we often think that the gender aspect of the MDGs is very much limited to goal three, which is basically gender equality in education. The point I would like to make is that this is a very limited vision of the MDGs. The gender responsiveness, the engendering part of the MDGs, is equally valid for every goal that we can think of. If we think of the environmental sustainability goal, goal number seven, without taking care of the issues of time use of women who take seven or eight hours in Africa to fetch drinking water or fuel wood, we will not be able to develop strategies and not be able to achieve MDGs unless we address that particular issue. The point I am trying to make is that we should not limit the whole question of gender equality with regard to the MDGs to goal three only. They are true, across the board, for all entities.

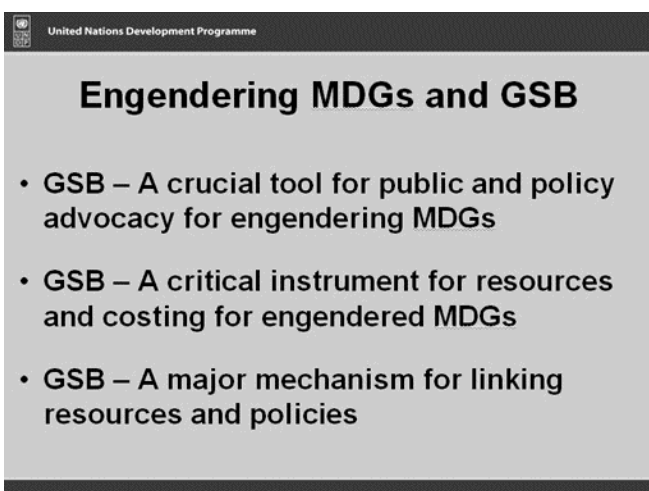


Panel.03

Having said that, if we now concentrate on the whole issue of the resources and the costing of engendered MDGs, then let me make three points at the very beginning. If we are thinking of investing in poor women for MDGs, we can make three arguments or cases. I think it came out very clearly in the presentation of Diane, and the subsequent discussions. We can make a moral argument: well, women in most of the countries constitute 50% of the population, so there is a moral argument that the resources, the expenditures, the budgeting, should also be responsive to them. You can make a rights-based argument also. Everybody has rights to resources, everybody has rights to certain basic social services, and therefore, women also have rights to resources, social services, and so on and so forth. That is the rights argument.

But when you are talking to the Ministry of Finance, or to the economists for that matter, the moral argument and the rights-based argument will not take you that far. What we have to do is to make a strong economic and social argument. Studies after studies, researchers after researchers, have indicated it very clearly: that investing in poor women provides better returns. Women are most prudent in investing their resources and their income; they are better in allocating the household income; they are better savers and investors. I think that it can be said across the board, at least from the region where I come from, that if you give extra income to women, the first thing they would do is to buy better food for their families, send their kids to school, and save a little bit of that money.

You give that extra income to men, the first thing they will do is to buy a cell phone or buy a television or do something which has very little productive use. While talking to the Ministry of Finance or economists, we have to make that economic argument that it makes complete sense, and better sense in economic terms, to invest in poor women, to invest in the basic social services to them, to invest in enhancing their capabilities. Then and only then those people are going to listen to us.



Panel.04

Having said that, then the issue is that if we talk about engendering the MDGs, and take the gender-sensitive budgets, what are the links? How can we really use the gender-sensitive budgets in order to enhance the issue of engendering MDGs? I can make three points there. First of all, the gender-sensitive budgets that have been found in different countries are crucial for public and policy advocacy. I want to differentiate between public advocacy and policy advocacy. Public advocacy is basically raising the awareness of a particular issue in terms of public relations, in terms of knowledge, and policy advocacy is basically advocating or convincing the policymakers and technocrats in terms of undertaking certain strategies and policies. In countries where gender-sensitive budgeting has been adapted or been pursued, it has been found that it is a crucial tool for public and policy advocacy, and we can use that tool equally for engendering the MDGs. We can say that the way that GSB can really enhance the welfare and well being of gender issues,

they can also be used for making a similar case in engendering the MDGs.

Second, we have found that gender-sensitive budgeting is a critical instrument for sources and costing, in terms of resource allocation, in terms of expenditures, as Diane's presentation has provided us with examples of how GSB can be used for resources allocation and costing. In engendering MDGs and in MDGs themselves, one of the major issues that we are debating and dialoging is the whole issue of resource mobilization and costing. This is not a simple issue, because first, in terms of MDGs, the costing sometimes gives you a resource-centric approach to MDGs. Yes, for the achievement of the MDGs, you need resources, but only resources cannot take you that far. It is not that simple that if you have US\$50 billion more tomorrow, the poverty of this world will be taken care of the day after tomorrow, because you cannot make that resource-centric approach to MDGs. Similarly, in terms of costing, it is not additive, it is not linear. In the area of costing there are certain synergies as well as marginality issues. When we are thinking of costing and resources in terms of engendering MDGs, some of the lessons from the gender-sensitive budgeting can be quite useful, and in that sense, gender-sensitive budgeting can provide a number of lessons and inputs in terms of costing and resources for engendering MDGs.

The third issue is that, as I mentioned, engendering MDGs is not only about resources. It is about policies and strategies. It is also about institutions. One of the lessons that we have learned from the GSB is that yes, the resource part is important, but the policies part is also important. At the same time, the culture and the outlook part is also important, the institutions part is important. The lessons of the GSBs in terms of the resources, the strategies, the institutions, the advocacy, can also be brought in when we are talking about the engendering of the MDGs.

Therefore, these are the three crucial links in which the GSB can really help in terms of engendering MDGs

across the board. Within this overall framework, if we now go to something which is very specific to UNDP and the Government of Japan: the UNDP Japan Women in Development Fund. In my mind, this is a flagship initiative for UNDP. I think within UNDP and in our work, the JWIDF projects have really contributed in raising the sensitiveness about gender issues, in raising the gender responsiveness in whatever we do. Whether we are thinking of the macroeconomic policies within the Poverty Group, or the energy and environment initiatives in the Energy and Environment Initiative, we always try to look at those issues through a gender lens, and in this regard, I would like to really congratulate our colleagues from the JWIDF for the wonderful work that they have done, not only in terms of the projects and the initiatives at the ground level, but also in terms of sensitizing us, within BDP and within UNDP in general, in terms of the gender issues in whatever we do.

In this connection, I think I would be failing in my duty if I do not recognize and appreciate the kind of vision and the leadership that Mr. Shoji Nishimoto, the Assistant Secretary General and Director of BDP, has provided in this particular respect. I remember that in different senior management meetings, he has made a point again and again that whatever you do, in whatever practice you are, just show me how each initiative, how each work that you are doing is going to be related to the whole issue of the gender issue, and enhancing the gender issue, I think that kind of vision and leadership is absolutely necessary in moving forward this particular agenda.

United Nations Development Programme

## UNDP/JWID Project – A flagship initiative

- **A giant leap (1995-2005)**
  - From *soft issue* (e.g. health and education) to *hard issues* (e.g. China's accession to WTO)
  - From *business as usual* (e.g. basic social service delivery) to *innovations* (e.g. piloting, replication and up-scaling)
  - From *Public advocacy* (e.g. awareness raising) to *policy advocacy* (e.g. strategy dialogues and debates)

Panel.05

Over the last 10 years, I think there has been a giant leap, if I may use that word, in terms of the JWIDF. Compared to 1995-1996, where it used to talk a lot on basic social service delivery to women, it is now talking about innovations: the question of piloting, the question of replication and upscale. I think that particular point has come up in the discussion earlier, the whole question of upstream and downstream; the micro and macro. I think the upstream/downstream question is not an "either/or" question, it is an "and" question. Whatever we learn at the micro level, the issue is can they be replicable at the macro level, can we scale it up at the macro level? If we can, then we have a good marriage of upstream and downstream, and that is what we are talking about. I think there also has been a giant leap in terms of — it started more in terms of public advocacy — in terms of awareness about gender issues, in terms of moving forward the agenda by raising awareness of all kinds of things. Now it is more in the policy-advocacy issues, it is talking about, or it is having dialogues and debates on the strategies, it is having discussions and negotiations on policies, and it is trying to basically concentrate on the critical national actors in moving forward in that agenda.



United Nations Development Programme

## GSB – the initial work within UNDP/JWID Project

- **First generation of GSB projects in Mongolia, South Africa and Uganda**
- **Challenges identified in areas of :**
  - Linkages between GSB and PRSP/MDGs
  - Ownership of GSB by national actors
  - Partnership
  - Capacity development
  - Women's political empowerment

Panel.06

In terms of the GSB, UNDP/JWIDF started with a first generation of GSB projects in Mongolia, South Africa, and Uganda. The experiences have been diversified. In some of the discussions later on, we definitely can go into more details in terms of those experiences, but we have been able, from our first generation of experiences, to identify certain challenges. Yes, in those countries there have been lots of talks about the GSBs in terms of having trainings, in terms of developing modules, but we also recognized that there has been a big link between the GSBs and some of the policies and strategies, documents, and initiatives that were taking place, like, for example, the poverty reduction strategy papers (PRSPs). In many cases, gender has appeared in various PRSPs as a kind of footnote, or a kind of add-on at the very end of the document, without having real policy discussions or real policy options being spelled out in those documents. The absence of linkage between GSB and the PRSPs for MDGs has been one of the challenges.

The second challenge has been the ownership by national actors. We know today that no policy, no strategy, can be sustainable unless it is debated and dialogued within national boundaries and there is a national ownership of that. In many cases, yes there have been lip service to the GSBs, bi-national actors, they have been patient listening to the arguments in favor of the GSBs, but when it comes to owning them, when it comes to assimilating them, that has not taken place.

Thirdly, I think there was a challenge of partnership. Today development is too large an initiative to be left alone to one actor, whether it is government, whether it is donors, whether it is civil society. We need a kind of alliance and partnership among all of those actors, and in many cases, during the first generation of GSBs that was lacking.

The fourth one was the capacity development. Basically, the indigenous capacity within the countries to assimilate the GSBs, to understand it, its instruments, the tools, the lessons; was not there. Part of the problem was that finally, in order to achieve all those things, you need women's political empowerment, an issue that has already been raised, and in many cases that was not there, whether at the national or at the sub-national level.

United Nations Development Programme

## GSB – a global project

- **Focus :**
  - Policy advocacy and dialogue for gender mainstreaming
  - Support to social transformation and reducing gender gaps
  - Strategic policy support
  - Crucial partnership and alliances
  - Capacity development and national ownership

Panel.07

On the basis of the first generation of GSB projects, the JWIDF has developed a kind of global project later on, after 2000 and the Millennium Declaration, the Millennium Development Goals, because the world has changed, the priorities have changed, and the focus has changed. In this new initiative, I think there are five issues which can constitute a kind of a focus. One was that yes, we would continue the policy advocacy and dialogue for gender mainstreaming, and you can see that we are emphasizing the policy advocacy part of it, the debates and dialogues and strategies and policies with technocrats, with policy makers, at the national and sub-national levels, on substantive parts of the GSBs. It would support the social transformation and

reducing gender gaps. In many cases, it is the norm, it is the mindset, which are the major constraints toward gender equality and reducing gender gaps. It would need changing mindsets in order to achieve the kinds of goals that we are setting for ourselves. The third is strategic policy support: UNDP being a substantive organization, being involved in the policy debates and dialogues, being an organization which is bringing out alternative views on the table on policy issues, and providing more strategic policy support or policy options to their governments and others. The crucial partnerships and alliances — this is basically in response to the challenges that we have identified during the first phase, and finally the capacity development and the national ownership, precisely gain our response to the problem that we have already identified. Those are the five focuses of the global project.



Panel.08

The achievements of the GSB global project — some of these things are still work-in-progress, and I think impact analysis needs a kind of a time lag between when you finished and when you are impacted. Having said that, even taking that in to account, I think there are three areas where we can really say that these are the things that we have been able to achieve. If we take the capacity development as a kind of broader area, the GSB project has been able to sensitize the parliamentarians in different countries, because in GSB, the budget discussion ultimately takes place in the parliament, and if you do not have constituents there who are supportive of the gender-

sensitive budgeting, you may do excellent technical work within the Ministry of Finance, but when it goes to the parliament, you are nowhere.

Finally, the GSB is also a technical process. You have to be aware and knowledgeable and familiar with tools, instruments, how to use those tools, how to use those instruments. Therefore, the training of trainers is absolutely essential, and the GSB has been quite successful in doing it. For the trainings, we have also been able to develop different kinds of modules. Again, it is not the issue that one kind of shirt would fit everybody, but then if we have different kinds of modules which can be contextualized in different situations that would achieve the kind of desired cause.

In terms of policy advocacy, I think there have been workshops in different parts of the world which really helped on the issue of gender mainstreaming and gender-sensitive budgeting. There have been electronic links to different kinds of networks, particularly in West and Central Africa, because through those networks it is easier to do the policy advocacy, and also it is easier to link to different kinds of expertise and resources in different parts of the world.

Then there is the strategy impact. I think in Mongolia there has been gender analysis of public budgets for employment and social sectors, precisely along the lines which Diane has mentioned. In Morocco, they have fostered the gendered MDGs using their GSB. What does it mean? They have done it in terms of sectoral resource requirements. I think these are some of the things that we can put forward as achievements, good results that the project has been able to initiate and achieve.

United Nations Development Programme

## GSB and Integrated Package of Services (IPS)

- **IPS Pillars**
  - Needs assessment and investment planning
  - Widening policy options
  - Capacity development
- **GSB**
  - A critical element in needs assessment and investment planning
  - A crucial tool for policy options in terms of resource allocations
  - An useful approach for capacity development for pro-poor budgeting

Panel.09

UNDP is also trying to embark upon the integrated package of services to support countries for MDG's national development strategies, and the three pillars that have been identified by Shoji: need assessment investment planning, widening policy options, and capacity development. We can immediately see that this is a critical element in need assessment and investment planning. The instruments and tools of GSB are absolutely crucial for proper budgeting, also. We can see how they can be used. By concentrating on resource allocations, I think this is a crucial tool for policy option and also for capacity development

United Nations Development Programme

## Three misconceptions about GSB

- **GSB – gender-sensitiveness is the key**
- **GSB – in budgeting revenues are as important as expenditures**
- **GSB – not about resources alone, but also about policies**

Panel.10

I think there are three misconceptions about GSB, and I would like to put it on the table. In GSB, the crucial word is gender-sensitive. GSB is not "budgeting for women." Gender is the socially constructed relationship between women and men, and when we are doing gender-sensitive budgeting, as long as it is moving that socially constructed relation to the desired direction or desired goal — that is, gender-sensitive budgeting. If in a country, for example,

men say that they will be doing of the child work and care work, and we need incentives for that in terms of resources, and resources are provided; that is gender-sensitive budgeting. We should make that confusion between gender-sensitive budgeting and budgeting for women.

Second, I know that in the gender-sensitive budgeting, often the discussions and the debates are on resource allocation and the expenditure side. I think that is wrong. Budgeting has two aspects: expenditure and also revenues. Therefore, in GSB we should also concentrate on revenues, and look what are the incidence of those revenues between men and women? Are they enhancing equality, or are they not? If there is a sales tax on products which families use or women use, and if it goes higher, then you have a situation which is distorted. Do not forget about the revenue side, the taxation side, the incidences and the burden of those taxations, who is bearing it? Do not only concentrate on the expenditure side. Finally, gender-sensitive budgeting is not about resources alone, but it is about policies, it is about institutions. We have to link those resources, institutions, and policies, together.

In conclusion, I think in 1920, Bernard Shaw wrote something. If my memory does not fail me, it goes like this: "Some people see things as they are, and ask, "Why?" Some people dream of things that are not, and ask, "Why not?" I think our work on gender equality in UNDP and JWIDF started with that "Why not?" question. Why not have policies and strategies that would enhance gender equality? Why not have approaches to the whole issue of budgeting which goes beyond the traditional approaches of the Ministry of Finance? Why not have public and policy advocacy which tries to change that mindset on that? We know, in the words of T.S. Eliot that we "dare disturb the world," because we do not want to basically walk the path which has been traveled so much; we want to walk the path that has not been traveled that much. In the ultimate analysis, the human destiny is a choice, and not a chance.

Thank you.

## □ フィールドからの報告

「UNDP/日本WID基金の支援による地域別の人材養成研修のフォローアップとして行われたイニシアティブの報告」



フィリピン  
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フォーラム プロジェクト・  
コーディネーター

### **New Initiatives in Gender Budgeting in the Philippines: Towards mainstreaming the gender perspective in planning and budgeting at the national and local levels**

Let me begin by thanking the organizers of this conference for the opportunity to meet and exchange experiences and ideas with esteemed experts in the field and to meet all of you. I would like to thank the United Nations Development Programme — for which I had the occasion to work from 1998 to 2003 – for its consistent support to these types of exchanges, which are important means to improve development practice. The Japanese Government has also been UNDP’s reliable partner, including in the promotion of Women and Gender in Development. Thanks are in order for the Ministry of Foreign Affairs and the Cabinet Office, as well as JICA and JBIC.

Philippines is known for its unique or different approach to gender-sensitive budgeting. Way back in 1995, even before we held the United Nations Fourth World Conference on Women in Beijing, the Philippine Congress (parliament) legislated a policy requiring all national government agencies, including government owned and controlled corporations, to set aside five percent (5%) of their total budget to fund programmes for women’s empowerment and gender equality. Theoretically, it comes to a hefty sum: US\$ 574 million represented five percent of the national budget in 2002 (which was at about US\$11.5 billion). How much was actually set aside is a whole different story. The plot thickens once we ask: what for

was the money spent?

One thing was certain: the policy made possible the sustained implementation of the gender mainstreaming approach within the Philippine government. The money funded, at the very least, gender sensitivity training of government officials and staff. To women’s organizations, the gender budget policy has been an important tool for advocacy, especially for targeted projects for women or those addressing gender issues.

What I am about to share are recent Philippine initiatives to go beyond the quota-based approach of gender budgeting to the mainstreaming approach in the context of results-oriented and performance-based budgeting. In 2004, we were facing two realities: poor implementation of the five-percent GAD budget policy on one hand, and the opportunity to mainstream gender in the whole national budgeting process, on the other hand. You see, the Philippine Government was re-energized into pursuing its budget reform. President Gloria Macapagal-Arroyo had won the election thus finally claiming to have the mandate to lead the country. There was also a looming fiscal crisis: the budget deficit was turning from bad to worse, since the Asian Financial Crisis in 1997. The World Bank was offering to fund the budget reform process.

The National Commission on the Role of Filipino Women (NCRFW)—the government’s national machinery for women — began to explore the alternatives. Women’s organizations were also re-examining their strategies, with the NGO network called Women’s Action Network for Development (WAND) as one of the key players. The timely and — I would say — persistent intervention of the Dr. Lorraine Corner of the United Nations Development Fund for Women (UNIFEM) completed the ingredients for exploring and alternative.

There were other pressures bearing on the NCRFW to seriously rethink or at least improve the implementation of the policy. Monitoring findings show very poor implementation. In 2002, for example, the total sum for gender and development (GAD) has been less than half of one percent (0.42%) while the actual sum actually spent was

much lower at only about one-tenth of one percent (0.15%). In actual peso terms, only about P970 million (about US\$19 million) of government's 2001 budget of P665 billion (US\$13.3 billion) went to Gender and Development (GAD) programs, projects and activities.

Yet, it must also be acknowledged that the GAD budget policy had made possible the implementation of innovative programmes and services that benefit poor and vulnerable women: halfway houses at the country's major ports as refuge for disembarking women who are vulnerable to sex trafficking and illegal recruitment (Philippine Ports Authority); training of women in vocational and technical skills that are traditionally male domains (Technical and Educational Skills Development Authority); training of women police officers in investigative skills — so that they would have better chances of promotion in this male dominated organization — and gender sensitization of male and female police officers to better equip them to handle cases of gender violence (Philippine National Police); and organizational capacity building on gender mainstreaming — gender sensitivity training, sex-disaggregation of data, etc. (various line agencies). The capacity building approach has produced positive outcomes for women living in poverty, by way of increasing the number of women who receive contracts for the stewardship or management of community forest resources (Department of Environment and Natural Resources) or increasing the number of landless women farmers who receive transfer certificate of titles of agricultural land (Department of Agrarian Reform). With a lot of pressure from women's NGOs, local government units applied the policy to pool together funds for women's crisis centers, to improve reproductive health services, to expand micro-finance and other livelihood services, among many projects and services, some of which are frankly quite innovative. Our classic example of is the initiative by *Lihok Pilipina* (which literally translates to "actions by Filipino women") in the city of Cebu. Through *Lihok Pilipina's* advocacy, a community-based approach to preventing and combating violence against women and children has become a regular program of the City Government. *Lihok Pilipina* continues to be the City Government's partner in implementing this program,

which has now been institutionalized.

Indeed, allies of the national machinery for women inside and outside government (including women's organizations and legislators) were concerned about poor implementation, including the danger that the policy could be revoked for this reason. Legislators like those representing the marginalized sectors including women issued two resolutions (1) to enjoin all national government agencies and local government units to implement the policy in full and (2) to inquire into the status of compliance to this policy for the purpose of recommending ways to improve it to benefit marginalized women. Many women NGOs raised the argument that women should not to be content with the five percent (5%). We should examine the whole one hundred percent (100%)!

UNIFEM support began with the "Preparatory Assistance to Gender Budgeting in the Philippines" in 2003. It sought to help national players – the gender champions inside government and gender advocates in civil society organizations – answer an important question: How can government improve the effectiveness of Gender and Development (GAD) budgeting, particularly within the context of the performance-based budgeting system that is evolving in the country? UNIFEM's preparatory assistance produced two outputs: (1) policy analysis paper entitled "Gender and Development Budgeting in the Philippines: Issues, Challenges and Imperatives" prepared by Women's Action Network for Development (WAND); and (2) project document that picked up the paper's key recommendations and that defined how to intervene in the ongoing budget reform, which this presenter developed.

The project, which was implemented in late 2004 up to early 2005, undertook strategic activities, such as:

1. A macroeconomic policy analysis that produced a paper entitled "THE IMPACT OF FISCAL RESTRAINT ON BUDGETARY ALLOCATIONS FOR WOMEN'S PROGRAMS" – It examined the impact of persistent revenue shortfalls on the part of the national government in 1997-2003 on the budget allocations for programs that support gender equality, and for public services that target

women or that meet their needs. It tracked the impact of the overall contraction of national government expenditures on the budget allocation for these types of programs/services. It also undertook sex-disaggregated benefit incidence analysis of the mainstream expenditures (to meet needs of general population or in line with the overall mandate of the agency). The policy study found that budget cut policy, which was implemented poorly by reducing budget allocation across-the-board, failed to protect critical social services for the poor and vulnerable. (This was particularly significant in the context of the Millennium Development Goals. The country report on the MDGs revealed that the Philippines will not meet the target for maternal health and on hunger. For this reason, the study focused on agencies that could do something about the situation: Department of Social Welfare and Development, Department of Health and Department of Agriculture. Department of Education was brought in.) Benefit — incidence analysis however showed that women benefited more than men in particular service lines (example: hospital services) while the opposite is true in others (example: National Tuberculosis Program). According to the study, this was not to prove gender neutral budgets. Rather, the findings demand gender analysis of the development situation. Why, for example, were there more women accessing hospital services? Why were they not availing of certain types of tuberculosis screening tests?

**2.** A systems research into the national budget process that produced a strategy paper for engaging the budget reform in order to mainstream gender budgeting. The paper is entitled “INSTITUTIONALIZING GENDER-RESPONSIVE BUDGETING IN THE PHILIPPINES: THE BEGINNING” analysed the budget process and recommended points for integrating gender responsiveness in the various stages of the budget cycle from macro policy planning through national budget preparation and implementation to budget accountability. (Please refer to the attached figures: Figure 1 presents the conceptual framework of this budget initiative, while Figure 2 presents the entry points for gender mainstreaming in the whole national planning and budgeting process.)

**3.** A pilot gender analysis of budgets of two ministries for the purpose of developing a technology or methodology to analyze the budgets of agencies in terms of how women and men benefit — The activity focused on two national government programs, which are the National Tuberculosis Program-Directly Observed Treatment Short Course (or TB-DOTS) of the Department of Health, and the Dairy Enterprise Enhancement Program (DEEP) of the Department of Agriculture-National Dairy Authority (DA-NDA). (The choice of these programmes was influenced — I believe — by the same issue of the country being off-track in terms of the MDG on maternal health and hunger). Debbie Budlender’s five-step model for the gender analysis of budgets, and Diane Elson’s gender analysis of the four dimensions of budgets, were particularly useful in this exercise. It revealed that after ten years of Gender and Development advocacy and capacity building (and after spending resources from the 5% GAD budget for gender sensitivity training), there have been few changes in the mainstream programmes and services that would make them sensitive to gender inequality such as in access to economic resources.

Part of the UNIFEM supported initiative to influence the budget reform process has a component carried out by an women’s NGO network, Women’s Action Network for Development (WAND). It was directed at the local government unit level, which is particularly important in the context of decentralization — a governance reform that had been running on for a decade already. Two LGUs were involved and these were the City of Sorsogon in the Bicol Region (at the southern tip of Luzon) and the Municipality of Hilongosin the Province of Leyte (which is in the Visayas. The initiative, which was entitled the “Local Level Gender Budget Initiative in the Philippines,” was designed to produce the following outputs: i) assessment of the gender impacts of local government policies, budgets and expenditures on maternal health and agriculture; ii) identification of entry points for strengthening results-oriented gender-responsive budgeting at the local level; and iii) development of indicators for measuring gender-responsiveness of the budgets of the two sectoral programs.

WAND's study into the gender situation showed maternal mortality and infant mortality were increasing in the City of Sorsogon, and information obtained in one village showed that local health services were slightly biased in favor of boys. Tuberculosis was also on the rise. In the Municipality of Hilongos — where the focus of the study was the agriculture program — there was no way of carrying out gender analysis because beneficiary data were not sex disaggregated, and output indicators like food production were not consistently monitored or local government spending on the nutrition program was not also recorded — or the data not released because of lack of cooperation of some local officials and the political dynamics among stakeholders.

Other activities were gender awareness raising for local officials and capacity building of local NGOs; facilitating workshops with local officials to training them in gender responsive planning and budgeting and dialogues with constituencies to surface priority gender needs and programs. Concrete results included improved local development plans and local legislation to support implementation and allocate resources.

“Awareness and acceptance of a better way of developing local plans and budgets, which is to link these with intended results” is a key impact of this initiative according to WAND. However, it is also realistic to concede that the shift from input-based to results-oriented budgeting would take continuous mentoring and monitoring. “There is also a need to further enhance the capacity of CSOs to influence LGUs to become more gender-responsive and results-oriented ... and to sustain critical engagements with LGUs” (WAND, 2004).

I went to some length to describe this to drive home the point that there are serious initiatives to reform the macro planning and budgeting systems in the Philippines in order to make these gender-sensitive. These initiatives have met major difficulties — from as the lack of political commitment to gender equality and women's empowerment from the national leadership and from the top officials of government agencies, fiscal constraints that impact the allocation of resources for programs and

services targeted to meet women's needs and interest, and low capacity for gender analysis and gender responsive planning, implementation, monitoring and evaluation throughout the national government. Yet, there are concrete mechanisms in place that we could build on to move the process forward. These are:

1. Improvement on the current GAD budget policy to focus on requiring all types of government agencies, including local government units and government-owned and controlled corporations, “to formulate a Gender and Development (GAD) Plan designed to empower women and address gender issues” in accordance with approved laws and plans including President Arroyo's Ten-Point Agenda. The five percent (5%) is being presented as the minimum cost of implementing the GAD Plan that is expected to be drawn from the agency's total appropriation for the fiscal year.

2. This provision in the annual budget law is operationalized through the integration of specific costing guidelines in the National Budget Call or the official guidelines for national budget preparation. Agencies are required to submit with their budget proposal a document outlining the GAD Plan including the targets, performance indicators and budget (In the new National Budget Call, the form is entitled BP 600: FY 2007 Annual GAD Plan and Budget).

3. The NCRFW is given a seat as part of the technical panel during the review of the agency budget proposals before the Executive Branch finalizes and consolidates its national budget for submission to the Legislative Branch (parliament).

There is such a long way to go yet for gender-responsive planning and budgeting process to be fully in place.

Through strategic partnerships between advocates inside and outside the state, as well as at the national level and internationally, I am confident that with consistent advocacy and persistent capacity building, as well as the support of the international community, Philippines will move closer to that vision.

Thank you.

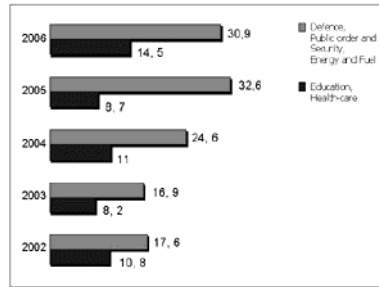


グルジア  
**カリタ・ジャシ**  
 グルジア Iv.Javakhishvili  
 トビリシ州立大学教授

**GENDER BUDGET FOR SOCIAL JUSTICE /GEORGIAN CASE**

Prepared by Charita Jashi, Natia Cherkezishvili  
 UNDP Georgia 20.07.06

**State Budget of Georgia**



In 2006 State Budget increased by 276 %

Main Priorities include:

- Defence
- Public order and Security
- Energy and Fuel rehabilitation, and
- Education 304,3%

**National Machineries on Gender Equality 2004-05**

Advisory Council on Gender Equality at the Parliament

State Policy on Gender Equality pending approval at the Parliament

Governmental Commission on Gender Equality at the Executive Branch

Draft Action Plan on Gender Equality elaborated

**Gender Neutral Macro-economy Policy**

Macro-economic policy is gender neutral and does not serve on of potential social risk impacts

The priority spheres of the Country budget Law Enforcement Ministries

**Impact of Gender Neutral Policy on Women's Social-Economic Status**

Sector	Percent Women	Percent Men
Industry	18.6	81.4
Com	22.9	77.1
Cons	6.0	94.0
Bank	25.0	75.0
Educ	81.4	18.6
Health	81.8	19.2
Agri	50.6	49.4

Economic growth is notable in following fields: communications, transport, financial services, industry and etc. Women's and men's economic activity, as a percentage of total economic activity, by sector

Source: State Department of Statistic of Georgia, 2005

**Initiatives Implemented with the Support of GRB Experts**

Gender Analysis of 2006 State Budget Conducted

Worked with the Finance and Budget Committee of the Parliament to introduce the Gender Budget criteria in circulars

Monitoring of the State Budget Programme in Social and Education spheres

Awareness on GRB increased among parliamentarians and government representatives

Published brochure in Georgian " Gender Budget for Social Equity. "

International Seminar " Gender Responsive Budget - 'A Way to Social Justice "

**Pilot project – Introducing GRB in Poti**

Inadequate understanding of the role and capacities of local government

No transparency

No social programs available to protect women's health and education

Confrontation instead of cooperation

Lack of trust and participation

Inadequacy of road and transportation means

Population not aware of the budget scope

**Next Steps**

•Incorporate gender requirements (aspects) in the circulars while preparing State Budget

•Participate in the formulation of 2007 State Budget - First attempt for integration of Gender parameters

•Continue work in the regions on district budget

•Raise Public Awareness on GRB

•GRB supports women candidates upcoming local elections





ゼネガル  
**ファトゥ・ディオウフ**  
 ゼネガル経済・財務省専門家

## The Objective of GSB in Senegal

- To make women's economical contribution visible
  - Unpaid work in the economy of care
  - Informal economy
  - Certain sectors such as agricultural sector see the intensity of production by women.
- To make some of national economic mechanisms gender sensitive



Republique of Sénégal  
*One people- One goal – One faith*



Macroeconomic policy and gender budgeting

***Gender Budget Initiatives in Senegal:  
 Applying GSB into PRSP policies, projects,  
 and programmes***

*Fatou Diouf's communication  
 Symposium in Tokyo*

## Gender Budgeting and PRSP

- The main objective of PRSP of Senegal – “To eradicate all kinds of exclusion and to implement equality of sexes, particularly in the primary and secondary levels of education by 2015”
- Integrating of gender into a national PPP (policies, projects and programmes) with the following three commissions
  - gender in PPP elaboration and implementation
  - gender budgeting
  - gender and indicators
- Partners:
  - the CSPLP/MEF (Ministry of Finance)
  - the development partners such as: UNDP, UNFEM, World Bank, the Civil Society Organizations, and Other resource persons

## General Background

- In Sénégal, 52 % of the population are female.
- Women share the informal sector which has been largely ignored.

## Entry points for GSB

- Sensitization
- Capacity Building
- Regional Network
- Medium Term Expenditure Framework (MTEF)
- Participative budget

## Are macro-economics and budgets gender-neutral?

— Budget as an instrument of rebalancing

- The State public budgeting is crucial for good governance including the fight against poverty.
- The budget is not neutral instrument.
- The budget is more than one simple technical compilation of revenue and expenditure.
- The non-gender sensitive budget hinders:
  - the development of nation
  - the progress towards democracy

## Ways Forward

- GSB as a necessary prerequisite of democratic and economic development

- The Need of Action Plan
- Ministry of Finance to include the budgetary letter of orientation
- To coordinate activities of the gender commission for the execution of the PRSP

## □ 午前部の総括



**廣野 良吉**  
成蹊大学名誉教授

First of all, I thank you very much for this honor. It is my pleasure to give summary and conclusions on the keynote speeches presented this morning by Dr. Diane Elson, the world-renowned professor and researcher on gender issues and gender-sensitive budgeting issues, and by Dr. Jahan, my old colleague at UNDP, as well as the excellent presentations based on field experiences funded by UNDP/Japan WID Fund, which, by the way, is one of the many non-core funds established by the Government of Japan. Again, thanks to their understanding, to promote development with gender equity and social justice, the core of the MDGs.

I am sure that all of the participants in this Symposium have been deeply impressed with the excellent explanation by Dr. Elson on the basis of her own practical experiences in the United Kingdom, India, and some countries in Sub-Saharan Africa on the critical importance of gender-sensitive budgeting and mainstreaming gender in macro-economic and social policies at the national and local levels. As you can see in her own Power Point presentation, she has first pointed out that macro-economic pictures are presented only in terms of monetary aggregates, on which I fully share her regrets. Secondly, unpaid work at home, on the farm or in small papa-mama shops, is simply ignored. This weakness is observed even in this country and even today. Thirdly, gender issues in employment are slighted in this country and elsewhere, too. Fourthly, people have not recognized the essential fact that the impact of macro-economic policy is gender-differentiated. Again, I concur with her observation.

Finally, neglecting gender impact would reduce effectiveness of macro-economic policy and, for that matter, sectoral policies. Now this is something that needs further analysis, because this is something which is far more complex than the earlier four statements. Dr. Elson concluded that the ways in which governments raise revenue and also allocate expenditure can be improved by recognizing the gender dimension of fiscal policy, and that outcome for gender equality, poverty reduction, and other objectives, can be improved by using GSB.

Dr. Jahan, on the other hand, mainly discussed on the critical importance of investing in poor women to achieve MDGs, giving the moral, rights-based, and economic and social arguments. He clearly convinced us all on the tremendous economic and social benefits that society would gain as a result of greater investment in the poor, particularly poor women in rural areas. In other words, engendering MDGs is crucially needed for MDG achievement, as he said. He also emphasized that GSB is a crucial tool or instrument for public policy advocacy for engendering the MDGs and also for linking resources with policies. On the last point I shall touch later, based upon my own experience in Japan.

Those presentations on field experience in Georgia, the Philippines, and Senegal, have also added applicable value to the issue of gender-sensitive budgeting, as well as a number of difficulties experienced by those countries in mainstreaming gender in national and particularly local development efforts, as well as in budgeting practices.

As you know, in the past, we often talked about and in fact appealed to various communities on the importance of gender in formulating development projects and programmes in various sectors, as well as developing gender projects in all countries including bilateral and multilateral assistance programmes and projects in developing countries, as in case of Japan. However, according to my own view, since the

budgeting process itself has not become gender-sensitive in most countries, not much progress has been made. In Japan and other OECD countries, there has been some notable progress in national and local efforts in mainstreaming gender in development, as noted by Minister Inoguchi of Japan this morning, but it has never been enough, and also never fast enough. We shall have to double our efforts in this direction.

In developing countries, with some exceptions, most governments unfortunately have not been responding much to the call of the development community at home and abroad for mainstreaming gender in development through gender-sensitive budgeting. A lot still needs to be done. As stressed by Dr. Nishimoto of UNDP as well as by Dr. Elson, we must keep in mind that GSB is not only for mainstreaming gender in national development efforts but also for enhancing development efficiency, effectiveness, transparency and accountability: the very essence of democratic governance that has become the central concern of UNDP ever since the publication of now well-known global Human Development Report, whose preparatory committee I had the privilege to chair at UNDP back in New York in the 1980s.

Let me just touch on some of my painful experiences — I say painful experiences — of introducing the concept of programme/project budgeting system (PPBS) back in the early 1960s. This particular concept was, as you know, introduced by the Department of Defense of the Federal Government of the United States, and meant to rationalize the rapidly rising defense expenditures of the United States. Mr. McNamara, the then Defense Secretary, who later became the president of the World Bank emphasized this particular concept. When I returned to Japan back in 1960 from the U.S., I tried, together with many of my friends in the academic community, to introduce this concept of PPBS, particularly in the then Economic Planning Agency. To me, PPBS is very similar to what we are now talking about, which is gender-sensitive budgeting. PPBS was referred to the programme and project budgeting system, but I now interpret this as

policy and programme budgeting system. You need to allocate budgetary resources to a set of policies and programmes. This was, however, very much objected to by politicians in Japan. As I said earlier in discussion on the experiences in the Philippines, politicians, concerned with their reelection, have to respond to their own constituencies who may want to have bridges and irrigation facilities in their villages, a road here and a railway/subway there through their own cities rather than responding to their national development. This is the very reason why PPBS which ties budgetary resources to national policies and programmes was objected to by politicians. Unfortunately the Economic Planning Agency, succumbing themselves to these politicians pressures, had to drop this concept, in spite of their theoretical and moral support. It was only by Mr. Junichiro Koizumi, now the Prime Minister of Japan that the concept of PPBS was revived in the government of Japan, as Dr. Inoguchi mentioned earlier. Certainly the PPBS today has become much more important in the budgeting process, as evidenced by the establishment of a division on policy evaluation three years ago in all the ministries of the Japanese government. Policy evaluation is certainly to evaluate on the basis of performance review guidelines how the ministerial, departmental and divisional policies enunciated in the beginning of the fiscal year have been achieved in each ministry. To me, finally we have now come, long after 1960, to appreciate PPBS in action.

Finally, I wish to congratulate on all the speakers for having done an excellent job in disseminating this concept of GBS in Japan. I am also very happy to see my old colleagues from UNDP organizing this important task so brilliantly. Certainly we learned a lot. Thank you very much.

## □ パネルディスカッション

MDGs達成にむけて：ジェンダーに配慮した予算の活用



モデレーター

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Selim

目黒依子(上智大学教授)： Good Afternoon, Ladies and Gentlemen. ご承知の通り、開発理念が「人間中心」となり、また、Women in DevelopmentからGender in Developmentへと考え方がシフトしてから久しいわけです。国連では、MDGsの達成を実現目標と定めています。その中で、ジェンダー平等と女性のエンパワメントは、その達成の前提条件であるという認識を持っているわけです。もはや、女性あるいは男性が特定の開発の対象や担い手であるといった発想ではありません。開発の政策立案から実施に至るあらゆる段階で、男女が共に主要な担い手であると考えられています。男女に公正な開発の成果をもたらすためのアプローチとして、ジェンダー主流化ということが、この10年間に広がってきました。

しかし、プロジェクト・レベルでの進展に比べて、政策レベルでのジェンダー主流化は、まだ限定的であると思います。GSBの戦略的重要性については、すでに1980年代にオーストラリアで提唱され、それ以来広がりがつつあるわけです。6、7年前にCSW(国連婦人の地位委員会)でも取り上げられました。また、今朝ほど報告がありましたように、UNDP/日本WID基金の活動にも先駆的事例が見られるようになりました。日本でも、女性NGOの要請によって、女性あるいは男女共同参画関連予算について各省からの説明が行われていますが、その内容は今朝のセッションから想定されるようなものではありません。例えば、年金や健康・保健関連の予算全体をカウントした7兆円あまりという数字が、日本の国防関連予算に匹敵するといったジェンダー平等施策への批判材料として使われるような実態があります。

日本では、GSBという概念に馴染みのある人は少ないです。GSBがジェンダー平等促進のために、そしてMDGs達成のためにいかに戦略性の高い重要な考え方であるか、また、それが実際に日本のODAの成果をあげるのみならず、日本国内のジェンダー平等推進に寄与しうるかを考えるために、これからのパネル討議は画期的なステップになると期待しております。

まず、パネリストの皆さんお一人ずつ、10分ほどプレゼンテーションをしていただきます。その後、パネリストの間でのディスカッションをいたしまして、その後、フロアからの質問をいただいて答えをしていただくという形式で進めたいと思います。では、ダイアン・エルソンさんお願いします。

ダイアン・エルソン(エセックス大学教授)： Thank you. I am very pleased to be taking part in this panel so that we can further our discussions that we had this morning. It is clear that government budgets and their



associated processes of implementation and evaluation are key in making the connection between the reporting of achievements in relation to the MDGs, between constructing plans, between constructing PRSPs, and the actual outcomes for the people of a country. I would argue that gender-sensitive budgeting is an important tool for the improvement of budgets in this context, especially in relation to what Selim Jahan called "engendering the MDGs," especially in relation to diminishing gender inequality in ways that will enhance the achievement of all the MDGs.

As those of you who were here this morning will know, gender-sensitive budgeting is not simply a focus on projects for women; rather, it is a scrutiny, planning and implementation of the overall budget from a gender-equality perspective in such a way that will not only improve gender equality outcomes, but also the efficiency, effectiveness, transparency and accountability of the budget process. It is indeed related to the idea of policy and performance budgeting, and can be an important way of deepening the kinds of budgetary reforms that are currently underway in many countries.

I want to give two examples. First I want to talk about changes in the overall pattern of revenue and expenditure. Bringing about changes in the overall patterns of revenue and expenditure are going to be important for the achievement of the MDGs. One important contribution of gender-sensitive budgeting is to examine the kinds of priorities that we see revealed in trends in the allocation of government expenditure. I thought the example we had from the Philippines this morning was an excellent example where the gender-sensitive budgeting there has monitored cuts in public expenditure and looked to see if there was any effective safeguarding of those kinds of expenditure, which are critical for achieving important MDGs and, in fact, finding that there was not.

This kind of monitoring of overall patterns of expenditure has also been the feature of some of the gender-sensitive budget work in Mexico where women

in the gender commission in the senate in Mexico monitored cutbacks in expenditure to see in which ministries did the cuts fall heaviest and how did they relate to gender equality issues. Again, they found that the cutbacks actually fell more heavily on the ministries that had important economic and social programmes for gender equality, particularly for poor women, and less heavily on some of the other ministries, such as the allocation for the Mexican Navy. The women in the parliament in Mexico on the gender commission were able to use that analysis to argue with the Ministry of Finance for a revision to those planned cutbacks and for a redesign of the expenditure cutbacks so that less of the burden fell on those programs that were particularly important for gender equality and for the advancement and empowerment of poor women. I think that those are two good examples of how, looking at the overall pattern of expenditure from a gender perspective, to reveal what are the priorities in relation to the achievement of gender equality can be very important.

We hope, in the future, that many countries will be in the position of being able to expand their expenditure as a result of debt cancellation and as a result of enhanced overseas development assistance. There, of course, it is equally important to look at the priorities and to look and see whether the additional expenditure is being directed in ways that will serve to diminish gender gaps and contribute to the overall achievement of the MDGs. I think gender-sensitive budgets initiatives can help us there.

I also would like to say something about revenue. When governments are going to be encouraged to mobilize more resources, they will be using sales taxes of various kinds to do this. It is important to examine the details of the design of the sales taxes to see what their gendered implications are.

The second point I wanted to make is in relation to infrastructure. There is not an MDG goal for infrastructure, but I think that we all agree that the achievement of the MDGs is going to require enhanced

investment in infrastructure. Sometimes there is a view that gender equality has nothing much to do with infrastructure investment, and that gender analysis cannot help us improve the investment. I beg to differ. I think there are tools of gender-sensitive budget analysis that can be very important in ensuring that infrastructural investment is directed in the most effective ways. The tools of gender-aware policy appraisal, sex-disaggregated beneficiary assessment, revenue incidence analysis, and beneficiary incidence analysis can all be very relevant here. If we think of the transport infrastructure, it is important to look at this through a gender lens in order to see how much of an emphasis is on improving the transport for those who possess large vehicles as compared with those who possess only small vehicles, especially vehicles powered by their own legs, and especially those who carry the loads on their heads. Is there a balance in the development of the transport system to meet the needs of the different members of society and the different transport requirements that men and women have? Has there been sex-disaggregated beneficiary assessment, where the intended beneficiaries of future programmes or the past beneficiaries of existing programs are asked, using the tools of qualitative investigation, how these projects have impacted upon them, and in what ways they might need to be improved in the future.

In terms of charging for facilities like water and sanitation and energy, for instance, what analysis has been made of the different ways in which they can be structures of charging, and has there been any consideration of the importance of cross-subsidization so that higher charges can be levied in higher-income households than are levied on lower-income households. South Africa has this kind of tariff for its energy and its water. This is very important for poor women, who will be bearing the brunt of not being able to access these resources if they are not able to pay for these facilities. Smaller charges for those who use small amounts is a very important practical policy, and it is the sort of thing that comes out of looking at the incidence of revenue-raising measures from a gender perspective.

Finally, in relation to infrastructure projects, it is often thought that you cannot look at the incidence of the benefits of infrastructure projects in a sex-disaggregated way, because infrastructure projects deliver services to whole communities or households, unlike education and health, which deliver services to individuals. There is not innovative work looking at the incidence of benefits from infrastructure projects using the time saved as a measure of the benefits, and looking to see how much time is saved for men and boys and how much time is saved for women and girls. That design of project, which brings about large savings in the time of poor women and girls, can make an enormous contribution, I think, to the achievement of the MDGs, particularly important in energy and water. We have, I am afraid at the moment, all too many examples of water and sanitation projects which did not live up to expectations, which were not well-designed, because women were not consulted equally with men, for which the charging structure was not well-designed from the perspective of poor women, for which issues like the maintenance of the system and the gender dimensions of responsibilities for maintenance and the training for maintenance was not considered. I think we can do better for projects in the future if we apply some of the tools of gender-sensitive budgeting to them, and that this will make a big contribution towards the realization of the MDGs.

**目黒:** Thank you very much for your insightful presentation. それでは、続きまして次のスピーカーにまいります。岡庭さん、お願いいたします。

**岡庭健(外務省経済協力局開発計画課長・当時):** 外務省の岡庭と申します。私は開発計画課長というポストで仕事をしております。ODA政府開発援助の政策作りをやっておりますので、私はODAの政策的な観点、あるいは日本のODAの観点から主として発言したいと思います。まず第1に、日本はMDGsそして世界の開発途上国の男女平等に貢献するために、2005年の3月にジェンダーと開発イニシアティブ、「GAD(Gender and Development)イニシアティブ」を発表いたしました。このイニシアティブを新たに発表した主旨というのは、それまで日本のODAの支援というものは、保健・教育、さらには経済社会活動への女性の参加、その3つの分野について女性の支援というものを

目的としたプロジェクトを主として支援してきました。しかしながら、日本のODAの活動は、それよりも幅広い活動を担っており、そういう様々な活動において、男性そして女性の視点、ジェンダーの視点を踏まえなければ、開発援助の効果というもの十分ではない。さらには、ジェンダー平等の目的にもなかなか貢献できないということで、「GADイニシアティブ」においては、すべてのセクターのODA、さらにはODAの案件形成から実施、その後の評価やモニタリングに至るすべての段階において、ジェンダーの視点を配慮するということを明記しています。したがって、先ほどエルソン教授が、インフラ整備に関してもジェンダーの視点を踏まえなければいけないという点を指摘されましたが、この点についても我々は努力をしていきたいと思っています。ただ、こういう新しい試みを進めるうえで、まず日本のODAの関係者の中でも様々な努力が必要となっています。

第1に、ジェンダーの視点を一部の分野ではなくて、すべての活動で配慮することになると、ODAにかかわる人たち、日本のODA関係者の意識改革、あるいは能力を向上させるということが非常に重要になってきます。そのために、我々は外務省が中心になって、研修の強化や、在外公館のODAタスクフォースとの電子的なネットワークの構築といったことを進めています。さらには外部の専門家のサポートを経て、職員の質問や照会について回答をするようなシステムを検討しています。

さらには、開発途上国におけるジェンダー統計というものも現状では中々十分整理されていません。したがって、ジェンダー統計を国際機関や他のドナーとも協力しながら整備することが非常に重要な課題になっています。そのうえで、今日の会合のテーマになっているジェンダー・センシティブ・バジェット、ジェンダーに配慮した予算について若干触れたいと思います。

第1に、このジェンダーに配慮した予算の考え方、あるいはそういうものは、ジェンダーの主流化、ジェンダー平等の達成のみならず、貧困削減あるいは開発を進めるうえで非常に重要な手段だと思います。なぜか、それは、第1に女性に対する影響、あるいは男性に対する影響を定量的に把握するという考え方が、ジェンダーに配慮する予算の根本にあるからです。すなわち、定量的に開発活動のインパクトを把握するという習慣をつけるということは、1つは女性がどれだけ開発に貢献するのか、あるいは女性に配慮することによってどれだけ社会全体が裨益するのか、ということ把握できるようになるという利益があるわけです。「なぜ、ジェンダーを配慮しなければいけないのか?」というような疑問をもつ人々が依然としている中で、非常に説得力のある材料を提供する可能性を持っている

のです。我々がODAを実施する際に、ODAの関係者の間でも、あるいは開発途上国との間でも、ジェンダー平等推進する動機付けの意味で非常に重要な要素だと思います。

第2に、プロセスの問題としてアカウンタビリティの強化につながるという利益があると思います。これは、やはり女性というのはしばしば社会において弱い立場にありますから、そういう開発活動の検討や実施の中で、女性を含む弱者が開発プロジェクトに参画をする、あるいは参画をさせると。そして、自らが意見を述べて、それが開発活動のあり方に影響を与える。このプロセスの改善自体が非常に重要な意義があると思います。

第3に、ジェンダーに配慮した予算を通じて開発効果が高まるという利益があります。これはまさにMDGsの達成と直結をしていて、貧困層の7割が女性だといわれている中で、貧困削減を効果的に進めるためには、ジェンダーに配慮した予算を活用しながら男女平等を迫ることがきわめて重要になってくると思います。MDGsとの関連では、日本のODAの1つの考え方というのは、「経済成長を通して貧困削減の達成をする」ということです。我々としてはインフラ整備、道路や通信網等を整備して、それから政府の人材育成を通じて投資環境の整備をし、海外からの投資を呼び込み、開発途上国の経済成長の促進を支援するというのを1つの重要な考え方としております。こういう活動の中でも、女性に対する影響がどのようなものなのか、ということを考えながら、いろいろな活動を行っていかねばならないと思います。しかも日本のODAの3割がインフラ整備に関連するといわれていますけれども、そういうことからしても、一見するとジェンダーと関係ないような、あるいは中立的だと思われるようなインフラ整備におけるジェンダーの配慮というのは、ますます日本のODAにとって重要な意味があると思います。

去年、UNDPとJICAが共同でインフラの研究を行いました。バングラデッシュでJICAが小規模な橋を建設したという例を研究対象として取り上げました。この例が非常におもしろかったのは、この橋を作ったことによって、従来学校に行けなかった女の子が学校に行けるようになったということです。これは、橋がなかったときには、女の子は何時間もかけて非常に苦勞して学校に行かなければならない、その途中で危険な目に合うかもしれないということで、多くの場合、学校へ行くのを断念せざるをえなかった。橋ができたことによってそういう子供たちが短時間で学校にいけるようになったという効果があった。これはもちろん、それ以外にいろいろな効果があるわけですが、単に商業活動が大きくなってその土地の収入が増

えるというだけではなくて、同じインフラでも、女性と男性に対しては異なる効果があるということを把握することがインフラ整備を行う上で重要なことだと思います。

最後に、日本の取り組みについてですが、まだまだ課題が多いと思います。やはり、ジェンダーに配慮した予算というのは、非常に新しい試みです。国内でもまだ十分、話を行っていない試みであり、日本の専門家を活用するとしても、なかなか対応できない面もあるでしょうし、さらには相手国の意識、相手国の能力の問題もあるので、我々としてはUNDPなどとも協力しながら引き続き、ジェンダーに配慮した予算あるいは、ジェンダー平等全般のためにODAを活用して努力をしていきたいと思っております。ありがとうございました。

**日黒:** どうもありがとうございました。それでは続きまして村松さんをお願いします。

**村松安子(東京女子大学名誉教授):** 村松です。よろしくお願います。私は只今の岡庭さんの発言も含めてUNDP/日本WID基金を支えているのが日本のODAという大きな枠組みを前提にして大きく問題を捉えたいと思っています。5点考えておりますので、逐次ご説明したいと思います。

まず、いちばん最初に申し上げたいことは、これまでマクロ経済とジェンダーをリンクする試みは日本ではほとんどありませんでしたから、貧困削減やMDGsとの関連で今日このシンポジウムが開催されたことに敬意を表します。1990年代に急展開するマクロ経済学やマクロ経済政策のジェンダー化の成果がこのシンポジウムで紹介されることの意味は本当に大きいと思っています。マクロ経済学や政策はジェンダーに中立的であると言われてきたのですが、これが神話である、mythであることが明らかになってきています。マクロの政策がメゾ、中間を通して社会を構成する個人(ミクロ・レベル)におよぶ過程で、実はジェンダーに基づく多様なバイアスが働くこと、そのことが結果として、マクロ経済政策の効果にジェンダーによる違いをもたらすこと明らかにされてきています。ジェンダーという場合には、ただ男、女というだけではなくて、階級、階層、どうい地域に住むどういう年齢の人かということも含めてです。

ここで特に申し上げたいのは、内閣府と外務省がこのシンポジウムをUNDPと共催しておられることは、今後日本のODA政策の策定、実施、評価に新しいディメンションを開くだろうという大きな期待を持っています。それと同時に日本の中での持続可能な人間開発を、マクロ経済政策のジェンダー化と

して再規定する可能性にもつながるのではないかと、いう思いをもって今日ここに参加しています。

日本政府が支援しようとする「経済成長を通しての開発」という政策が、ジェンダーの平等と女性のエンパワーメントと両立し得るためには、経済政策がジェンダーに敏感でなければなりません。また、同じくらい大事なものは、経済政策とジェンダーに敏感な社会政策とが統合されることです。それによって、MDGsの達成がより現実的かつ実現可能になるのではないかなと思います。それが第1です。

第2に、外務省の日本のODA関係部署が明日(2006年8月1日)をもって再編統合されると聞いておりますが、その過程の中で職員へのジェンダー・トレーニングも強化されたようですし、ジェンダーに敏感なODAを目指そうとする動きを高く評価したいと思います。

「GADイニシアティブ」が発表され、それに続いてソフトな分野だけではなくて、ハードな分野をUNDP/日本WID基金でカバーしていく、という動きは非常に喜ばしいと思っています。最近数年のODA予算の削減をうけてUNDP/日本WID基金それ自体への拠出が廃止されたのは非常に残念ですが、効果的な運営を目指して他の基金と統合し、Partnership Fundが新たに設立されました。そこで後でご質問したいのは、この新しい基金の中で、クロス・カutting・イシュー(分野横断的課題)であるジェンダー平等と女性のエンパメント支援を確実なものにするための戦略は一体何なのか、ということです。

政策は、それ自体がどんなに立派であっても、適切な予算の配分があって初めて現実のものとなります。予算は、政策のプライオリティを示す鏡だと理解しています。では、予算が配分されればそれでいいかと言えば、それだけでは不十分です。インプットとして予算配分があったなら、その効果を見定めなければなりません。まずは、どのような活動がどんなプロセスを経て実施されているのか、その実施過程の問題。それからどんなアウトプットが生み出されたのかというアウトプットの評価。さらに、直接の効果だけではなくて、間接的な効果も含めて、どんなアウトカムを生み出しているかも評価されなければなりません。ですから、例えばある組織にジェンダー問題を担当する人を配置したからといって話が終わるわけではない。実はそれは第一歩であって、全過程でのジェンダー主流化をフォローアップする必要があると思います。

第3点目は、財政資金を効果的に運用しながら、日本が得意



としない分野において、UNDP／日本WID基金を通してUNDPとパートナーシップを結んできたことがこれまでに大きな効果を上げたことです。パートナーシップについて考えるときには、実は日本の市民社会との連携の大切さも明記したいのです。

具体的には、ODA大綱でのジェンダー視点の強化、あるいは「GADイニシアティブ」を発表されるに至る過程の中で、日本の市民社会の活動が担った力を忘れてはならないと思います。ODA予算のジェンダー分析や、インプット、活動、アウトプット、アウトカムというものを手掛かりとしてODAを評価し、その次の予算要求に結び付けようとするような明確な動きは今のところは出ておりませんが、たとえば明日予定されているジェンダー・バジェットのワークショップには、UNDPは20人くらいの参加者を想定していらっしゃったようですが、50人を超えるお申込みがあったと聞いています。これは、こういう新しい分析ツールを使って何とかより効果的なODAができないか、と日本の市民社会の人たちが考えており、一生懸命取り組もうとしているということの表れだと思います。ですから、そういう動きに対するアカウンタビリティを高めるためにも、また市民社会の参加を促して相互に強い連携ができる可能性も視野に入れた、このような取組を積極的に行っていく必要があると思います。

第4番目には、UNDP／日本WID基金は、戦略的に日本の二国間援助を補完する形で運用されてきました。先ほど申し上げましたように、日本があまり得意としていない分野を、それを得意分野とするUNDPとの連携によって相互補完的に支援しているということですが、二国間援助においては、男性を経済の主たる担い手、女性はケアの担い手だというような固定的な役割分業を想定していることが非常に多いように私は見えています。それは、非常に短期で見たときのジェンダーの実際のニーズの重視だと思いますが、一方、UNDPは、いわゆる戦略的ジェンダー・ニーズ、もう少し長期的な視点を持って女性の役割を認識し、ジェンダー平等の達成を目指しながらエンパワーメントを支援しているようです。このギャップがまだまだ非常に大きいと感じます。ODA全体を通してジェンダーの主流化を実現する戦略を練るのは、再編の過程にある日本の外務省の中で、あるいはODA全体の中で一体どこが、どの部署が担っていくことになるのでしょうか？このことも教えていただきたいのです。

最近の一連の機構改革を通して、ジェンダー主流化戦略の策定の責任がより明確になることを望んでいます。その際、具体的にはジェンダー政策のプライオリティが予算の配分で示されることが必要だと思っています。どの部署が責任を持つのかに加え、プライオリティはどこにあるのかが、非常に大事な

問題となります。また、額やプライオリティという狭い意味のODA政策だけではなくて、ODA全体をカバーするわけですから、政府職員のすべてのレベルにおけるジェンダー・トレーニングがとても大事だろうと思っています。

最後に、これまで日本のODA予算においては、ジェンダー平等と女性のエンパワメントに関しては政策の策定、実施、評価など、すべての過程を改善するための研究や人材養成に十分な資金が充当されてきたとは言いがたいように思います。当初、ODAのジェンダー研究というのは、実務家が主導してきました。最近やっと大学院での教育が重視されるようになっておりますが、こういう分野での研究能力の向上や政策策定に結びつく人材養成、あるいは適切な政策を作っていくために必要な統計の整備、つまりジェンダー統計の整備というようなものも含めて、本格的な研究および調査研究のための基礎を作ることもODAの非常に大事な問題だというふうに思っています。

そして、パフォーマンス・バジェット型の予算が進んでくると、評価の問題がでてきます。そのためには、最初に明確なターゲットを設定する必要があります。具体的なターゲットを設定し、その上でどんなアウトプットやアウトカムが出たかを評価する。その結果に基づいて次の政策が検討される、というプロセスが現実のものになるわけです。パフォーマンス・バジェットは、もしかしたら日本のODA政策がエントリー・ポイントとなって、日本全体のジェンダー政策の評価と策定、主流化としてジェンダー政策を前進させる大きなきっかけになるのではないかと思います。どうもありがとうございます。

**目黒：**どうもありがとうございました。それでは最後になりましたが、セリム・ジャハンさん、お願いします。

**セリム・ジャハン (UNDP開発政策局貧困削減顧問)：** Thank you. I will start with the overall context that I provided this morning: if MDGs are not engendered, then MDGs will not be achieved, and if PRSP is gender-insensitive, PRSP will remain lopsided. I would also like to reiterate the linkage that I presented this morning, between GSB and engendering MDGs and making PRSP gender-sensitive. First, GSB is a major instrument for public and policy advocacy. Second, it is a useful tool for costing resource requirements, and third, it is an important mechanism for linking resources with policies.

Having said that, let me just concentrate on two major

issues. One is UNDP's work on engendering MDG strategies and PRSPs, and second, UNDP's role in bringing GSB to the domain of engendering MDG strategies and PRSPs.

Our work on engendering MDG strategies and PRSPs, I would like to highlight issues there. First, there has been an MDG review through a gender lens. We have looked through all of the MDG reports that have been produced at the country-level through a gender lens to see whether the indicators, the data, the policy issues have been sufficiently gender-sensitive. One of the things I would like to point out there that the disaggregation of data is absolutely key, whether we are interested in monitoring and evaluation, whether we are interested in developing policies and strategies.

I would like to highlight two issues on the issue of disaggregation of data. One is that I still feel that in the disaggregation of data, the emphasis has been, in major parts, on the outcome indicators, and not so much on the input indicators. Even if we have disaggregated data at the country level, we have it on the whole question on life expectancy, we have it on the question on literacy, but we do not have disaggregated data, for example, on whether we know the sex-disaggregated situations with regard to access to health services — we do not know. There is hardly any developing country, to the best of my knowledge, where you do not have sex-disaggregated data with regard to formal credit given to men and women, and unless we know, or unless we have disaggregated data in terms of input and effort, we are missing a big puzzle of the whole picture. That is the first point.

The second point is, yes we want sex-disaggregated data, both outcome and input, but I think we have to go beyond that. If we do further disaggregation, in terms of socioeconomic groups, in terms of ethnic groups, I think the results in the picture would be more resourceful. We may come up with a situation where we find that a man in rural areas may be worse off compared to a woman in urban areas. I think that we should not limit ourselves only to the sex-disaggregated data, and go

further, because there are class issues, there are ethnicity issues, there are socio-economic group issues. We would miss a large part of the gender issues unless we have that kind of disaggregation.

The second work that we have done is basically engendering MDGs for a few pilot countries, like Peru and Morocco. What do I mean by engendering MDGs, from A to Z? It means that we are not only looking at monitoring and evaluation; we start with the goals, and how we can make them gender-sensitive; we look at the data and the indicators, how we can make them gender responsive; we look at the policies and strategies, how we can look at the gender lens; we look at the resources, how we can make it gender-sensitive — so at least in those pilot countries, we are having a comprehensive review as to how we can engender MDGs.

The third work we are doing, in regard to the PRSPs, is to make PRSPs gender-sensitive. This is not an easy task, we all know. Not only making PRSPs gender-sensitive, but to make PRSPs human developments incentive is a major issue. Going beyond that, at least in countries like Cambodia or Morocco, we are looking at the PRSPs, analyzing the policies, both at the macro level, soft and hardcore. Looking at the tax policies — what does it mean for men and women? Looking at the expenditures — what are the impacts of that? Looking at the whole question of resource allocation — who are bearing the incidence, or the burden of, for example, fiscal policies and/or commercial policies? What are the implications of the user costs of basic social services versus women and men? Those are the kinds of debates or policy prescriptions we are bringing to the table in the PRSP countries, to make them gender-sensitive.

What has been our role in bringing GSB to the domain of engendering MDG strategies and PRSPs? I think I will just highlight two major experiences as it comes from the UNDP/Japan WID Fund initiatives. There are lessons that can be learned. There are issues that can be used there. Firstly let me highlight the Moroccan

experience where five issues are important: they have used it for public and policy advocacy for GSB; they have engendered MDG goals to address their indicators; most importantly, the costing and resource requirements have been used for MDGs through the GSB procedure and methodologies. They have done it at the macro level as well as at the sector level; finally, there has been GSB monitoring and reporting on how their resources have been used, allocated, what has been the efficiency of the resources.

The Mongolian experience is a little bit different, which is more related to the PRSPs and GSBs. First it started with an analysis of public budgets on social sector and on unemployment, through gendered lens. They looked at the donor contributions and also the loans. Then they promoted capacity development and sensitization of parliaments, ministries, national research institutions, and civil society. That meant widespread training, and GSB methodologies and tools. There had been networking and linking of websites, and finally they produced manuals for replication of the GSB experience in Mongolia in other transitional countries.

In conclusion, let me make three points. One, we have been discussing a lot on MDGs. I want to bring to the table the issue of Millennium Declaration itself, because there are lots of things that are in the Millennium Declaration, but have not been translated into MDGs. Let us not forget those things: the issue of human rights, the issue of good governance. Those are parts of the Millennium Declaration. Just by looking at some quantifiable time-bound targets, i.e. MDGs, let us not forget the bigger picture.

Secondly, there is no need for goals on everything because there will be certain goals and there will be certain strategies. It does not bother me that there is no goal on employment because I know that employment will be a major strategy to achieve some of the goals. It is not the end of the world if there is no goal on infrastructure, because we all knew that infrastructure, whether big or small, would be a major

instrument to achieve some of the goals.

Thirdly, as Mr. Okaniwa has mentioned, in fact last year, though the collaboration between the Government of Japan and UNDP, we have a study called "Making Infrastructure Work for the Poor". One of the conclusions which Mr. Okaniwa has elaborated came out quite strongly, that infrastructure has a gendered face. While you are providing those services in a country like Bangladesh, whether you are putting the tube well by the side of the road or at a place where women can go makes a huge difference in terms of culture. If you have a bridge, it can enhance the school enrollment of women and girls because otherwise they had to cross the river, which was risky. That particular part we have done. Some of the work of the GSB we are going to take it forward because we are embarking on the integrated package of services for MDG-based national development strategies. This includes the needs assessment work, resource requirements and policy issues, methodologies, and instruments. The tools that have been developed in the GSBs are going to be used in those things and we would like to move those things forward in the future work of UNDP.

Thank you.

**目黒:** Thank you very much. パネリストの皆さんの最初のプレゼンテーションはこれで終わったわけですが、パネルの中でのディスカッションを始めるにあたり、お互いのプレゼンテーションに関して簡単な質問があればまずはそれを伺いたと思います。

**村松:** 質問ではないのですが、PRSPに関して会場の皆さんに説明が必要かと思います。

**目黒:** ジャハンさん、お願いします。

**ジャハン:** Poverty Reduction Strategy Papers, known as PRSPs, started back in 1999. It was an outcome of the Comprehensive Development Framework, or CDF, which was introduced by James Wolfenson, then the President of the World Bank.

The first generation of PRSPs started in 1999, but there are three issues there, if I may say so. One issue is that

if you look at the first generation of PRSPs, it basically started with a kind of macroeconomic framework, which is very much related to the structural adjustment of the 1980s. You have all kinds of goals, like a balanced budget, balance of payments, inflation rates below 3%, and etc. You have a kind of macroeconomic framework at the very beginning, which is more growth-oriented. Number two — then there was a de-link between the kind of macroeconomic framework that you are suggesting and the poverty reduction strategies that are coming there, because a) there was not a kind of growth strategy that was more poverty reducing — you were missing that — and in the poverty reduction strategies also, there are more sectoral strategies rather than overall, and thirdly, issues like environment and gender equality were sprinkled here and there, but they were not part of the overall strategy. Thirdly, I think the PRSPs also had what we call the medium-term expenditure framework (MTEF) and sometimes the medium-term expenditure framework would look at resources, which may not be linked to the growth strategy.

The first generation of PSRPs has been finished in many countries: they are now in the second generation. The final point that I would like to make: whether we like it or not, in most of the countries, the PSRPs have become the medium-term development plans, so all the strategies, including all the macroeconomic strategies and the poverty strategies, are now being thought and challenged through the PRSPs.

**目黒:** Thank you very much for your elaboration.

I know it is your bag.ほかに何か表現上の、あるいは概念上の質問がありますか。ダイアンさん、どうぞ。

**エルソン:** I would like to ask my colleagues from the Government of Japan and from UNDP about the plans for institutionalization of gender-sensitive budgeting initiatives. These are initiatives which donors are very fond of starting, but they are not always very fond of following them through. We heard this morning how it has taken Japan many, many years to move towards policy and performance-oriented budgeting. These

kinds of reforms of public finance very often take a long time. I was impressed by what I heard from Selim about the way UNDP wants to use some of these lessons in the MDG process and I was very interested to hear from our colleague from Senegal this morning about trying to carry forward these insights into the PRSP process. But I do think this issue of how you institutionalize this in the budget process of a country itself is critical. We heard from Senegal the attempt with the medium-term expenditure framework; we heard from Georgia, with the attempt to institutionalize this and the calls that the Minister of Finance makes on the other ministries in preparing the budget; we heard from our colleague from the Philippines, the identification of these entry points in the national budget process. I think that this challenge of how can we institutionalize the use of some of these tools and perspectives as a more routinized part of a country's budget process is important. I think that the budget process is important, not just the sectoral ministries, because the ministry of finance in the budget process has a power throughout government. If the ministry of finance in the budget call makes a demand for gender-sensitive programming and gender-sensitive indicators, other ministries have to respond. Clearly with taxation it is only the ministry of finance that can handle that. Actually, the ministry of finance is an enormous power for gender mainstreaming, if only we can get the ministry to use it. Much more power than any ministry for women's affairs, no matter how ably-led, and clearly we have some very ably-led ministries like that in this region. I would really like to challenge my colleagues from UNDP and the government of Japan on this strategy for building on this work we heard about this morning, to make sure it can really be institutionalized.

**目黒:** Thank you. That is not a very simple question. Why do not we kick off our discussion among the panelists, first responding to the question just raised.

**ジャハン:** Yes, I am acutely aware that I am in the presence of my boss, Mr. Shoji Nishimoto. He may disagree with me, or he may support me, but I think from the UNDP perspective, there are three things. One is that a lot of work has been done on the whole

question of the gender-sensitive budget, on an analytical front and also on an operational front. I do not think it would be in the best interest of UNDP to reinvent the wheel. We are also aware of some of the methodologies and the tools and instruments that this approach has developed. My first reaction would be to use those tools and methodologies for doing a pro-poor budget, which may not be very different from gender-sensitive budgeting. Since we are dealing with public resource management, some of those tools can be used in what we will be doing on the pro-poor budgeting. Number two is that — I agree with you Diane — that if the Ministry of Finance agrees or supports, your life becomes easy. But it is not easy to convince the Ministry of Finance in any country on those things. I think UNDP has a role as an advocate of pro-poor policies; we have an advocacy role in terms of alternative approaches. I take this advocacy role quite seriously, and through our Country Offices, through our practices, we will try to negotiate and convince the Ministry of Finance on those issues, not on moral arguments, not on a rights-based argument, but on purely economical grounds.

Finally, we will be rolling out support to MDG-based national development strategies around the world, and one of the things that will be highlighted in this process is the whole question of needs assessment in terms of resources and funding for achieving the MDGs. We will use this particular approach in order to highlight those things, or to provide the needs assessment to the countries.

**岡庭：**この問題は、日本のODAで相手国をどうやって支援するかということなので、我々はこれまでJICAを中心に女性省に対する政策面での支援をしているわけです。同時に農村開発やインフラ整理の面でプロジェクトを支援しているわけで、そういう活動の中でジェンダーの視点を配慮していくという努力を始めたところなんです。したがって、そういう活動の中で、いかにジェンダー面での影響というものを定量的に把握するのかということ、それが今我々が課題として取り組もうとしていることです。

そのためには、いろいろな面で日本の関係者の能力の強化が必要だと思っています。これは単にある国のODAタスクフォ

ースの中で一人ジェンダー担当官を指名すれば、すべての問題が解決するというものではありません。方策のひとつとして、本省の経済協力局長からジェンダーについての問題意識を高めるための訓令は打っております。同時に、現地の関係者が日々の業務でどうやったらジェンダーに配慮できるのかということについて、いろいろ質問がありますので、先日も元UNDPの専門家の大崎麻子さんや、SIDA（カナダの援助機関）のステリンさんの参加も得て、海外の日本のODA関係者とビデオ会形式で質問に答えるという、そういう試みも行なっています。制度的にジェンダーを主流化するための取り組みと、制度の下でどのように体系的に能力を高める努力を続けるかということを考えながら今我々は努力している最中です。

**目黒：**ありがとうございました。この考え方に関しては、まだ日本の側のキャパシティ・ビルディングはまったく追いついていないという状況にありながら、相手国をどう説得していくかということで、はなはだ困難な状態にあります。そこで、国内外のことを同時進行しなければならない。そのための戦略をどうするかということが求められるようですね。

**村松：**2つ問題があると思います。1つは、支援国においてジェンダー・バジェットを推進するようなインスティテューションが構築されるように働きかけるということ。岡庭さんもそのように理解されているような気がしました。もう1つは、日本のODA予算をどうやってジェンダー分析していくかということなんです。また、先ほど申し上げたように、ジェンダー分析というのはまずどこからか手をつけないと、なかなか始められない。まず、そのきっかけをもしODA予算のジェンダー分析から始めることができれば、これは非常に有力だと思っています。それを実際に誰がするかという問題ですが、日本の場合、予算のジェンダー分析において、財務省の役割も重要ですが、現在は経済財政諮問会議の役割も無視できません。それから、与党の中の予算に係わる委員会もフォーマルではないとしても、大きな力を持っている。そして財務省。財務省のジェンダー・センシティビティを上げるのが如何に困難かというのは、1995年に論文として公表されています。これはその論文が掲載されているWorld Developmentの編者として、エルソンさんもよく把握されていらっしゃると思います。

日本の場合、男女共同参画会議の下にある監視影響調査委員会などが、たとえばODA予算とは限りませんが、予算のジェンダー分析を始めてくだされば、それが最初の手掛かりになるのかなと思います。

**目黒：**ありがとうございました。岡庭さんも個人的な意見を簡

単に述べるということが困難な立場だと思しますので、いろいろお考えはあるかと思いますが、その一端をちょっと聞かせて頂きました。ほとんどはオフィシャル・ステイメントだと思います。これをきっかけにして、もっと具体的な戦略を練る方向にいていただくというのが、最大の成果ではないかと思えます。

**会場からの発言：**日本が実施している年間8千億円超のお金がジェンダーの観点からどういう意味があったのかということ、どういう目標をたてて分析・評価をするかというのは、私は評価も担当していますが、因果関係の証明はかなり難しいと思えます。ただ、ODAのプロジェクトを実施したときの成果の分析や、あるいは国ごと、開発途上国ごとの分析、あるいは評価は行っているわけです。少なくともその部分は我々も努力をして実施はしているわけで、ODA予算総額のジェンダー分析をすることが、どれだけ理論的に意味のあることができるのか、というのは若干疑問を感じます。ですから、ODA全体でやるのがいいのか、それともプロジェクトごとか、相手被援助国ごとにやるのがいいのか、ということはよく検討すべきではないかと思えます。

**目黒：**まだパネルの中でのディスカッションを続けたいのですが、廣野(良吉)先生、ダイアンさんの疑問に答えるという意味で、何か情報提供がございますか。

**廣野良吉(成蹊大学名誉教授)：**どうもありがとうございます。総務省の政策評価ガイドラインにおいて2つの先行例があげられます。1つは「環境」という視点です。日本のすべての省庁が行っている事業を「環境」という視点から分析し、評価する。これは既にやっています。二つめは、身体障害者の方をどれだけ各省庁が採用しているかどうか、民間企業において身障者の方々の採用をどの程度推進するかという指標です。後者のほうはあくまでも協議ではありますが、経済同友会や経団連といったところが一緒にやっています。

ところが、総務省のガイドラインの枠組みの中に「ジェンダー」の視点からの評価というのはまだ入っていません。総務省のガイドラインというのは、日本のあらゆる省庁のいわゆる政策評価です。その枠組みにおいて「ジェンダー」という視点から各省庁の事業を評価する、これは1つの突破口になるかなと思えます。

**目黒：**はい、ありがとうございます。今朝ほどからの議論を聞いておまして、やはり何を突破口にするかということが、重要なポイントになると思えます。つまりはエントリー・ポイントをどこに取るか、どういうタイミングで取るかということだ

うと思えます。

岡庭さんの最初のプレゼンテーションにもありましたけれども、定量的に把握する、実態を把握するということ言えば、どの領域でもいいのですが、定量分析しか信じない人々の頭に杭を打ち込んで、これはやって価値がありそうだと思うことで広がっていくかなど。特にジェンダーの領域というのは、環境とは比較にならないくらい抵抗のある領域なので、それもひとつの戦略ではないかという印象を持ちます。それでは他に何か質問、取り上げたいポイント、あるいは意見はありますか。

先ほどの岡庭さんの挙げた例で、バングラデシュで橋を作って、女の子が学校に行けるようになったというお話ですが、この種の話というのは、別に学校に行くということだけにとどまりません。女性たちが商売をするときに、近くに橋ができることによって大変時間が節約できて活動時間が増える、よって経済活動の効果が上がるというような事例ですね。これはいわゆる「ジェンダー領域」の事例としては、もう10年以上前にたくさん出てきている話なのです。ただ、このような事例は、いわゆる「ジェンダー領域」にその情報がとどまって、他の領域に広がっていない、ということだと思います。だから10年遅れで、たとえばバングラデシュで最初に予期していないような成果が現れた。つまりサイド・イフェクトがこんな形でジェンダー平等につながるということにやっと気がついた。気がつかないよりはいいわけですが。

問題は、その情報が一部に限定されていて、主流化されていないということです。それによる無駄がずいぶん大きいというふうに思いますので、こういうことに気がつくような状況が生まれてきた、非常にゆるやかではありますが、ゆっくりと、しかしこういう方向に来ている。そこにGSBの考え方が入ってくることによって、さらにその定量分析をもって、いわゆる主流のところにも入り込んでいける、というチャンスが訪れたのではないのでしょうか。

**村松：**橋のことに関連して言いますと、これが予算も含めてジェンダー分析が非常に難しい問題の1つなのです。2週間前にオーストラリアのシドニーでフェミニスト国際経済学会が開催され、エルソンさんも私も出席しました。そこでボーダー・トレードについて報告がありました。国境があいた、つまりある意味では橋が架かったと同じことですね、そのことによって、それまでは女性は非公式に、つまり記録に残されていないボーダー・トレードに従事していたのが、記録に残される活動にかわった。これは非常によかったのです。取引量も非常に大きくなりましたが、よく見ると、誰がどういう仕事を担うかという、そ

の仕事の担い方に大きな変化ができてしまい、これまで主としてこの仕事に関わっていた女性の役割が周辺化されてしまう結果となっているのです。ですから、目標があって活動があってアウトプットは出ますが、その先のアウトカムの評価というのは、何を狙いにして、何を期待して、何を評価するかということだと思えるのですけれども、目標の設定次第で効果の特定ってというのはかなり変わってくると思うのですね。

たとえば、橋1つの評価でも、ポジティブな面とネガティブな面がある。ポジティブな影響を受ける人と、ネガティブな影響を受ける人が必ずしも一定していないし、そこにちょっとした工夫をすることによって、さまなければ生じたであろうネガティブな効果が生じなくなる可能性もあるわけです。たとえば橋を架けるとか、国境を分けるとかというようなことの絡みで予算におけるジェンダー分析をしていくことによって、いろいろな可能性が出て来るのです。ODA予算総額をジェンダー分析しなければいけない、そういうことではなくて、いろんな形があり得る。プロジェクトもあるかもしれないけれども、全体としてどうなっているのだろうという視点もあると思うので、その辺はフレキシブルに考えていただけたら嬉しいです。

**目黒:** 先ほど出ていた質疑に関連して、MDGs達成のための戦略としてGSBを取り入れるということについてのドナー国の役割。先ほどUNDPの役割についてはお話しいただいたのですが、ドナー国と日本の役割、あるいはシビル・ソサエティ(市民社会)、特に研究者やNGOの役割というものがあるかということについてコメントいただけますか。つまり、自分のおかれた立場からこういう役割が、というのではなくて、人の立場からこういう役割が必要だということも含めての話ですけれど。

**岡庭:** やっぱ説得力がないと誰も新しいことをやりたがらないし、あるいは付加的なことをやりたくないわけですね。要するに日々、10やらなきゃいけないことがあって、相手国の政府であれば毎日死んでいる人が大勢いるときに、ジェンダー問題と言われると、死んでいる人よりも重要なかというような議論にもなりかねないわけです。やはりジェンダーというのはいろんなイシューの中の1つの問題であるわけなので、それらのイシューの中で、このジェンダーの問題というのは、お金と時間を投入する価値のあるものだと理解してもらうことが、私としてはとても重要ではないかと思っています。

したがって、ドナー国の側からは、「ジェンダーは重要だ」という単なる一般的なステートメントだけではなくて、ある国の置かれた状況ではジェンダーに配慮することがいかに開発全体、

社会全体の開発にとって利益があるかということ、できれば定量的に説得力をもって説明することが、相手国自らのイニシアティブでジェンダー予算を導入するきっかけになるし、逆にそういう定量的な情報がないとむしろ日本の中でもODA関係者に対してそういうことを主張していく、もしくは配慮するということも難しい、というのが現状ではないか思います。

**目黒:** はい、ありがとうございました。エルソンさん。

**エルソン:** Let me speak as a professor and a member of civil society who has worked for donors but who is not a donor, and who has worked with many women's organizations in developing countries. I will be interested to hear from some of our partners in developing countries, too. I am very skeptical of conditionality, and I would certainly not wish to see GSB, or any other policy, be a condition of ODA. I am skeptical of World Bank and IMF conditionality; I am skeptical of conditionality all together. I would take my stand on the commitments that governments that are recipients of ODA have already made to their own citizens through things like the Beijing Platform for Action and its reiteration in 2000 and 2005, through their commitment to the achievement of the Millennium Development Goals. I would say that I hope the donor's role would be in assisting governments to discharge the commitments to their own citizens that they have already made, but that they may lack adequate resources, adequate international trading arrangements, and perhaps help them to think about new angles on things. For instance, the effective prevention of people dying is a critical issue with high levels of HIV/AIDS. I think what gender analysis has done is to help governments to see how gender inequality is in itself one of the major factors for the spread of HIV/AIDS, and how, in order to reduce deaths from HIV/AIDS, you have to empower women and girls to refuse unsafe sex. I think this is a really good example of how preventing people dying is not separate from addressing gender equality issues, but how gender equality issues are absolutely central to preventing people from dying.

I also think that donor countries have much more

persuasive voices in the dialogues that they should be engaging in, rather than the imposition of conditions, if they practice what they preach. This is what I always say to European governments — if you are going to be advocating gender equality measures, it will help if you can say we are doing this at home. I think the Nordic countries generally can say we are doing this at home; I do not know that all the other donor countries, including the one that I come from, the United Kingdom, can do that. I do think it is important for this to be mutual cooperation, in which we all try to learn from one another. Certainly in the UK, in developing our work on gender-sensitive budgets, we have been able to learn, for instance, from countries like South Africa, Tanzania, Uganda, and Mexico. I never see this as a one-way relationship. We can all learn from one another, and that is, I hope, the way forward.

**村松:** 研究者の役割から言えば、ODA全体ではありませんが、たとえば専門家派遣というODAによる支援を取り上げて、どのような分野にどういう人がどのくらい派遣されて、どういうことをやっているのかというようなことについてその効果を見ることがもできます。少なくとも私自身も含めて、研究者はそういうことから始めていく役割があると思います。また、NGOの方たちもジェンダー予算に関してはとても興味を持っていらっしゃるの、そういう方たちと協力してジェンダー予算を取り入れ、実際にデータを作っていくことができるのではないかなと思ってます。

**目黒:** はい、ありがとうございました。それでは会場からの質問がございましたらどうぞ。

**西本昌二(国連開発計画開発政策局長):** Thank you. Selim, you are absolutely right — you spoke on my behalf. I think we are in total agreement here on UNDP's commitment on gender stands over the test of time. But I must also confess here, in front of you, with my whole experience of 35 years or so, it is not that easy to match our policy work relative to the wide range of challenges development practitioners face day-to-day. What I am saying is really that we have taken the empowerment of women and gender mainstreaming as a two-track strategy to address gender equality. Gender equality is the goal, whereas we want to pursue both the empowerment of women

and mainstreaming of gender as a strategy.

Empowerment of women is relatively simple because we can see targeted intervention, goal-setting, as Professor Muramatsu said — how many women in parliament we want to have, or how much money in the budget could be spent earmarked on a specific activity very much focused on women's issues — these are not gender issues, they are more of women's issues.

What is more complex is the mainstreaming part, as exemplified by Mr. Okaniwa's story. It is really difficult to measure in a quantitative way how far we have come, where we stand in terms of mainstreaming gender, not to mention how far we are making progress every year. Unless we have some benchmarking, set in a visionary approach, and formulate the strategy of how far you want to go, we are basically shooting the dog, so to speak. I think it is very important and it has been my challenge as well as for the gender team in UNDP. I have asked them to come back with a very simple, maybe three indicators, which I think would have to be perhaps at the country level, to raise the issue that Mr. Okaniwa mentioned, but it also give us a lot of methodological challenges. You cannot really identify which agency is making what kind of progress, what sector is doing what project. There are so many what you might call "multi-collinearity" in terms of the variables that you try to address. If you look at a particular country and think how far the country is making progress on gender mainstreaming, which is expected to lead to gender equality, then we are making a real breakthrough in terms of selling this idea to those who are in charge of the revenue and the fiscal expenditure allocation within the Ministry of Finance.

As I say, it is not easy, but I think, like the human development industries we have here at UNDP, we have got to have some simple way of measuring both where we stand as a benchmark and how far we will make it. Otherwise, I think the story goes anecdotal — this bridge was great — but how do you know that will happen in ex ante? The challenge is always in ex ante. Yes, things went fine, but you do not even know that.



However, investments either in health clinics or schools or bridges are expected to last for more than 20-30 years. We have got to have some idea in ex ante before you make any investment. What do you expect out of this particular expenditure exercise? This is the real challenge. I really ask you, and urge the experts in this room, to look into the measuring issue because it is very critical. Thank you.

**目黒:** 今の質問は大変クリティカルな問題だと私も思います。パネリストの皆さんの中で、今の質問に対してコメントありましたら、お願いします。

**エルソン:** I think we are all agreed that better quantitative indicators are very helpful, and what you seem to be asking for is really indicators of effort, how far are governments actually introducing gender mainstreaming. I think one good indicator would be: has the government institutionalized any measures to consider the gender impact of its revenue and its expenditure? Some governments have. The government of India has now institutionalized something. The government of Chile has institutionalized something, the government of Sweden has institutionalized something, the government of France has institutionalized something. There may be lots of imperfections with these different kinds of institutionalizations but some governments have now institutionalized measures either on the expenditure side and/or the revenue side to do a gender impact analysis, particularly when any new revenue or expenditure proposals are made. I think that is one good indicator of how far governments are really genuinely trying to look at the gender impact across a wide range of government activities.

**ジャハン:** I agree with you Diane, but at the same time, I think that the question is not only in terms of resources; it is beyond that. I think Shoji's question was broader, in terms of the whole question of gender equality. I would like to make two points there: the first point is that I think we have to distinguish between parity and equality. You have a country where the girl's enrollment rate is 7% and the boy's enrollment rate is

also 7%. So if you take equality in a literal sense, then this is a perfectly equal world, but we know that there is parity there, but this is a society where both men and women are deprived. The kind of intervention that should be made is to lift everybody up. But if there is a disadvantaged group, to lift them faster. I think we should not confuse between parity and equality. That is the first point.

Secondly, in terms of the broader measure of, for example, gender equality or gender empowerment, some of the initial work had been done by UNDP. The Gender Development Index (GDI) and Gender Empowerment Measure (GEM) have come out of human development. We all know that they have limitations; particularly the GEM — questions have been raised that it is very top-down, if you are not a member of parliament, if you are not a manager, does it mean that you are not empowered? What about an African woman who takes seven or eight hours to fetch water or firewood, trying to support family? I think, on a broader context of equality, we can start with the measures that are available, but I think that the point Diane was making was that often we look at the outcome results but not so much at the effort results, and whether there can be short-term Human Development Index (HDI), if I may say so, which looks more on the effort results, are there a few variables which may change in the short term, not the stock variables like literacy, which do not change in ten years. Maybe that would be the way of coming up with a more comprehensive measure of gender equality.

**目黒:** ありがとうございました。他に質問はありますか。

**質問者1:** はい。お茶の水女子大学ジェンダー研究センターの杉橋と申します。コメントとお願いがひとつずつあります。量的調査、定量的とか質的というお話が出ていましたが、この両方を合体させながら、ジェンダー・バジェットを見ていかなくてはならないと思います。外務省の方から、定量的というものが必要だという意見が出ていました。それはまったくその通りであって、かつセリムさんもアウトカムの定量的なものが必要だというふうにおっしゃっていましたが、場合によっては定性的なデータを使ってカバーするということが可能だというふうに私

自身は考えています。

2番目は、統計を作る場合に、とりわけ途上国においてはスタティスカル・キャパシティが非常に弱く、ジェンダー・バジェットを進める際にも支障がでてきます。日本のODAで途上国におけるジェンダー統計のキャパシティの強化を支援していただきたいというのが2点目のコメントです。

**質問者2:** コンサルタントの藤本と申します。先ほど村松先生がおっしゃった戦略として、サクセス・ストーリーやベスト・プラクティスを見つけて、それを波及させていくのが1つのやり方ではないかと思えます。たとえば、ワングリ・マータイさんというノーベル平和賞を受けた女性がおられますが、この方は高い教育を欧米で受けた後に学校で教えられて、そしてケニアに戻られてグリーン・ベルト・ムーブメントというのを起こされました。失われていく森林をもう1回復活させる、それを通して、地元の女性に仕事を与え、教育、たとえば会計学的な教育を行っていくというようなこともなさった方ですが、そういうようなことをたとえばUNDPにやっていただければ、大変ありがたいのではないかと。

その例として、先ほど上映されたビデオで紹介されていたプロジェクトでは、地元組織のSEWAへの支援を通して、インド北部の貧しい農村女性がICTを学び、衣装のデザインなどをして豊かになっていく、というようなケースが報告されていましたが、そのような実際のケースをいろいろなところに広げていくということを是非やっていただきたいと私は思います。

**目黒:** コメントありがとうございました。他に質問、あるいはコメントございますか。はい。

**質問者3:** 私はJICAジェンダー・チーム長を2週間前から担っております池田と申します。日本のODAをいかにジェンダーに配慮した形に予算も含めて変えていくのか、日本のODAなりJICAの事業予算をいかにジェンダー・センシティブな形に変えていくのかということについて、若干コメントしたいと思います。

ジェンダーに特化した、あるいはWIDに特化した予算を取るというのは、やろうと思えばできなくはないと思います。関係者が限られていますから、ジェンダーに関わっている人たちが、場合によっては外部の声をうまく使いながら予算化するということはあるのだと思います。しかし、JICA全体、あるいはODA全体の予算をよりジェンダー・センシティブなものに変えていくためには、財務省の人が変わればよいということではなくて、逆に財務省の方が必ず言うのは、「予算の最初の提案をする

のはあなた方なのだから、あなた方のそれぞれの部署のところでジェンダーに配慮して優先順位をつけて、場合によっては他のものを削ってあげればいけないか、我々にそんなことを求められてもわかりません」というふうことです。つまり、ジェンダーにセンシティブな予算を作るということは、関係者が極めて多くなりますからそれだけ難しいということになります。JICAの予算、あるいは日本全体のODA予算をマクロな観点からジェンダーに優しいかどうかを評価することが果たしてできるのかどうかという、私自身は疑問です。そうではなくて、JICAの予算、日本のODAの予算を如何にジェンダー・センシティブに変えていくのか、そのプロセスを評価するってということはたぶんできるのだろうなどは思います。

たとえば防災分野については、昨年来、いろいろな大きな緊急援助が行われています。ジェンダーに配慮しなければ適切な緊急援助ができない。そのためにはたとえば緊急援助で入る女性のお医者さんの割合を増やさないといけない。ところが200人のお医者さんが緊急援助に登録されていますが、女性はたった30人しかいない。これでは実際に現場に行っても、女性が診察に来ないということになると、どうしても医師団に女性のメンバーを増やさないといけない。そのためにはたぶんお金が必要だろう。それは財務省が主張するのではなくて、外務省なりJICAの緊急援助を担当する部局がそういう意識を築いて、それを予算化、予算提案しないといけない。同じようにすべてのセクターで同じような気付きがあり、予算化して、はじめて全体としてジェンダーにセンシティブな予算ができる。そして、最終的に結果として全体予算の何パーセント位がセンシティブな予算になっていますよ、ということと言えるかもしれません。しかし、目標を立てて、今の状態は何パーセントですよ、ということが果たしてどういう意味があるのか、あるいはそれができるのかどうかについては疑問だというふうに考えます。以上です。

**目黒:** ありがとうございます。只今の最後のコメントにつきましては、経験から具体的なコメントをいただいたと思います。ただ、いろいろな関係者がいるのでなかなか調整がつきにくい、ということは他の領域でもあります。そしていろいろなレベルであると思います。そういう問題が常に出てくるので、国連の女性の地位向上委員会の議論では、ジェンダー平等を推進するにあたっては、政治的意思が必要なのだと多くの国が言っています。政治的意思というのは、国家元首である必要のないわけですし、各レベルの方針決定にかかわる人の政治的意思ということだと私は理解しています。そういうことを私からのコメントとしまして、パネル・ディスカッションを終わりたいと思います。皆様どうもありがとうございました。

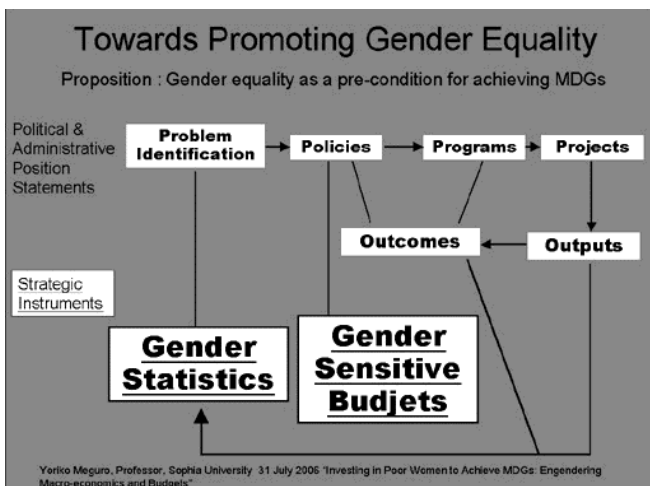
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私が本日の全体の総括をするという役割になっておりますが、時間がやや超過しましたので、詳しいことは申し上げる時間がありません。また、何かまとめをするということは、あまりにも議論が深いし、多岐にわたるといった内容ですので、ここでは敢えてしません。

ただ、ジェンダー・センシティブ・バジェットだとか、たびたび出てきましたジェンダー統計というものが、全体の政策や具体的なレベルでのプロジェクトを通して状況を変革するというフレームワークの中にどういったふうに関わっているのか、その位置づけを明確にするためにチャートを作ってみましたので紹介します。



関連図

この関連図は、何か政治的な問題があって、問題解決の必要性が出てくるので、まずはどのような問題があるかということを確認する、というところを出発点にしているのですが、問題があってもそれを取り上げるか取り上げないかという政治判断があるわけです。そういう意味では、これは政治的あるいは行政的なポジション・ステートメントであると言えるかと思えます。そして、問題が何かということが明らかになると、それを解決するためにどのような政策を打ち出すか、ということになります。その政策がもう少し具体的なレベルになってプログラムになり、また具体的なプロジェクトになる、というふうには捉えています。これはロジカル・フレームワークというものです。プロジェクトの結果が出てきて、それが逆にプログラムや政策の要望に応えられるようなアウトカムとどういったふうにつながるかということを検証しなければならない。アウトカムと政策

が論理的につながるようなものでなければこのフレームワークは成り立ちません。政策がきちんとしていてもプログラムやプロジェクトの作り方が間違っているということになる。こういう理解をしているわけです。

「問題が何か」ということを明確にするために必要なのがジェンダー統計です。つまり、ジェンダー統計によって実態が明らかになりますので、それをもとにして、どこにどのような問題があるかということを確認する。

今日のメイン・テーマである、ジェンダー・センシティブ・バジェットというのは、実はこの政策レベルでの重要な戦略になります。つまり、ジェンダー予算は戦略的な政策ツールであるという考え方です。これが実際にアウトプットやアウトカムとして変化が生じた場合にはジェンダー統計に反映されるということになり、ひとつのサイクルを形成するのです。ですから、考え方としてはプログラムやプロジェクトの段階でGSBを導入するという考え方もあるかもしれませんが、実はこの政策のところに入っているということが重要で、それを具体的にどのように活用するかというのはそれぞれのレベルでの問題だというふうに思うわけです。

外務省が発表した「GADイニシアティブ」をどのようにGSBとの関連で実現していくのか、また、日本国内でGSBをどのように実現するか。今日の発言にたびたびでてきたように、GSBは途上国に対する開発援助の問題だけではなくて、我々すべての国の国内の問題でもあるということですね。最近の日本ではジェンダー統計への関心が高まっています。資料集も出ています。しかし、まだ十分ではない。既に存在する統計の再確認をしてGSBの視点から捉える作業をもっと積極的に行うことで、かなり豊富なジェンダー統計のコレクションになるのではないかとこのように考えます。

もう一点は、ジャハンさんの言葉を借用しますと、パブリック・アドボカシーとポリシー・アドボカシーは違うということ踏まえたうえで、今の日本の状況ではこの両方を同時に行っていかなければならないと思うわけです。パブリック・アドボカシーがある程度進んでから、ポリシー・アドボカシー、というのは間に合いません。ですから、いかに同時に進行させるかということが、日本にとっての重要課題であると思います。いろいろなアクターがいる中で、シビル・ソサイティーの場合には、能力のある人、関心のある人からやっというところからかなり柔軟に行っていくことができますが、政治家にこういう情報を提供したいといっても向こうが受け入れるかどうかはわかりませ

ん。だいたい政治家の方々と話をするのも、ものすごく短時間で要点だけを話をする、相手の方々がグループでいらしても、そのうち会議があるとかで出たり入ったりが多いということで、基本的にあの方々は勉強をするという時間のゆとりがなさそうです。我々も時間のゆとりはない中で、勉強をしなければ前進がないと思ってやっているわけですが、なかなか難しいところがあります。ポリシー・アドボカシーはそういう意味で、アクターにとっては難しいところがありますが、正面からGSBなのだというふうにいけますと抵抗がある。どういう戦略をとるかは、既に指摘されましたように、経済的に、あるいは社会的にこういうインパクトがあるのだということを示す。私たちの業界といいますか、グループの中では、真正面からジェンダー平等なんてことをいうと、耳を傾ける人々が限られる。これは厳然たる事実です。ではどうやって聴く人々の間口を広げていくのか。メッセージを発していくときによく使われる言葉が、「こういう話はお得」です。お得。つまり、コストに対して報酬のほうが大きいというアプローチをとるとわかりやすいということです。

ただ、その時に「お得、お得」と言っていると、本来の目的がどこかに消えてしまうので問題です。ですから、両方を出したり引いたりしながら、あるいは新しい第3のアプローチを見つけてやっていく、というところは、予算に限らず全体の課題ではないかというふうに思います。ただ、本日は村松さんもおっしゃったように、UNDPと外務省、内閣府が共催でこのシンポジウムを開催したことによって、お客様の範囲が広がったということはあると思うのです。つまりアドボカシーのとても良い第一歩になったというふうに思います。GSBの発想を身につけることによって、結果の評価をする文化が欠如している日本社会ですべてのアクターが予算、ジェンダー・センシティブ・バジェットについてのオーナーシップを持つ、という方向にシフトするきっかけになれば、このシンポジウムは成功であったと思います。ありがとうございました。

内閣府・外務省・UNDP共催ワークショップ  
**「ミレニアム開発目標達成のための戦略：  
 ジェンダーの視点を取り入れた  
 マクロ経済と予算のあり方」**

協力：国際協力機構（JICA）、国際協力銀行（JBIC）  
 2006年8月1日（火）、於：UNハウス5階

**UNDP / 日本WID基金：実績とイノベーションの紹介**



**西本 昌二**  
 国連開発計画（UNDP） 総裁補・  
 開発政策局長

UNDPでは、人間開発と貧困削減を支援するには、ジェンダーの視点と取り組みは欠かせないものであると認識しています。UNDPのジェンダーにおける政策は、ジェンダー主流化と女性のエンパワーメントの2本立てで取り組むことにしています。つまり、既に現存するジェンダー格差を埋めつつ、すべての支援においてジェンダーの主流化を目指すというものです。

<変革期>

2002年に執行理事会からUNDPは組織全体でジェンダー問題に取り組むべき、という厳しいお達しを受けました。つまり、ジェンダーに既に取り組んでいる有志の集まりによる結果に頼るのではなく、組織をあげた取り組みをするべきである、と。これは、開発の世界をリードするUNDPへの期待も込めたものであります。2005年に受けたIndependent Evaluation（外部評価）の結果も厳しく、まさにUNDPが組織として揺さぶられたのです。

そこで、2005年からCorporate Gender Strategy and Action Planを実施し、オランダ政府から財政支援を受けて、組織内部のキャパシティ・ビルディングを大規模に行いました（世界45カ国の事務所、4つの地域事務所、5つの本部にあるセクション）。そして、2006—2007年のAction Planを提出し、さらに、UNDPの通常予算から毎年5百万ドルをジェンダーに関する取り組みのために拠出いたしました。

Action Planは、「4C」に集約されます。つまり、

- ① Commitment
- ② Capacity Building
- ③ Communication
- ④ Core-resources

です。

中でも重要なのが、総裁自らが議事進行を務めているGender Steering and Implementation Committeeの存在です。ここでは、毎回各地域局が地域でおこなっているジェンダー関連の取り組みについて報告をすることになっていきます。まさに、①のコミットメントの実践であり、既にUNDP内での変革が肌で感じられる今日この頃です。そういう意味でも、2002年から2005年にかけての外部からの揺さぶりは、ポジティブな変革をもたらしたと言っても過言ではないと思います。

私の話のあとに、UNDP / 日本WID基金についての紹介がございますが、ジェンダーの分野に過去11年間にも及んで支援をしているのは日本政府だけです。さらに、同基金は実に革新的な取り組みを行っており、世界各国にあるUNDPから大きな期待を寄せられております。引き続き、この支援が続くことを切に希望するところです。



**斎藤 万里子**  
 UNDP開発政策局 UNDP /  
 日本WID基金担当官

UNDP / 日本WID基金の担当官をしております斎藤と申します。今日は大勢の方にお集まりいただきまして、ありがとうございます。GSBへの関心の高さは、昨日のシンポジウムでも感じましたが、今日も引き続き、UNDP / 日本WID基金で得た知見をこのように日本の関係者に還元できることを大変うれしく思います。

GSBに関する詳細につきましては、日本での第一人者でいらっしゃる村松教授や、UNDP / 日本WID基金を6年間担当された、私の前任者であり、開発とジェンダーの専門家である大崎さんからありますので、私は、簡単にUNDP / 日本WID基金の実績とイノベーションについてご紹介させていただきたいと思っています。

UNDP/日本WID基金は、1995年の北京会議後、北京行動綱領のフォローアップと日本政府による「WIDイニシアティブ」の実施のための具体策として、UNDP内に設立されました。これまで71案件、総額16.9百万ドルに及ぶ支援を、国レベルにおいては50カ国、また、その他にも地域レベルの案件やグローバル・レベルの案件をとおり、多くの男性・女性たちへの支援を行ってきました。それぞれの案件の詳細につきましては、10周年報告書を是非ご覧いただきたいと思いますが、簡単に、本基金の「売り」と申しますか、重要性を申し上げますと、やはりイノベーション(先駆的・革新的取組みへの先行投資)にあると思います。

UNDP/日本WID基金の重点分野は、大きく分けて3つあります。ひとつは、マクロ経済とジェンダーで、GSBへの支援もその一つです。ほかには、ICTとジェンダー、そして、女性の政治的エンパワーメントと民主的ガバナンスです。ICTとジェンダーでは、インドのICT案件で、インフォーマル・セクターに属する、読み書きのできない女性たちがICTを駆使することで家族の生活だけでなく、自分の経済・社会的地位を向上させた案件があります。女性の政治的エンパワーメントと民主的ガバナンスは、GSB支援もグッド・ガバナンスの強化に役立ちますし、そのほかでは、コンゴやボスニア・ヘルツェゴヴィナでは、紛争後の復興支援の一環として、ナショナル・マシナリー(ジェンダー主流化のための国内機構)の設立や女性の政治的参加をサポートする案件もあります。

このように、多くの案件がありますが、UNDP/日本WID基金のイノベーションは、ジェンダーと開発分野における新たな開発課題に取り組んでいること、それを事業レベルの支援に落とし、実施する力にあります。それらの案件は、その場で終わるものではなく、案件レベルの持続性は当然ながら、知見の積み重ね、つまり、ナレッジ・ビルディングを徹底することで、UNDPのグローバルなネットワークに乗せてほかの国々や地域で応用されるよう配慮しています。また、英国サセックス大学のジェンダー研究機関であるBRIDGEだけでなく、UNIFEMなどを含むUN機関との連携や、政府レベルのカウンターパートでも、女性省に限らず、GSBでいえば財務省や計画開発省などメインストリームの省庁と仕事をすることで、インパクトと波及効果を最大限に生み出すことを常に心がけています。

こうして10年間の経験と実績を積んできた基金は、昨日のシンポジウムや本日のワークショップのように、知見と経験を日本のみなさんに還元する時期にあると思っています。特に、GSBは、ダイアン・エルソン教授も何度もおっしゃっていたよ



**村松安子**  
東京女子大学名誉教授

「ジェンダーに配慮した予算とはなにか。  
ジェンダー課題達成のための手段となりうるか」

## 「ジェンダー予算」分析とは

- 国・地方自治体・ODA予算などを「ジェンダーの平等」視点から分析
- ジェンダー平等政策を推進するように配分されているかを査定・評価し、それ以降の政策形成に活かす手法
- 政策の「総合評価」の典型
  - 直接効果(産出: output)だけでなく、副次効果や波及効果、間接効果(成果: outcome)も問題にする評価
- 過年度の実績評価
- 北京行動綱領の「ジェンダー主流化」の手段の一つ

3

## ジェンダー予算分析の展開過程

### マクロ経済政策のジェンダー化への導入点 としてのジェンダー予算分析

- 1984オーストラリア 1990イギリス女性予算グループ
- 1985ナイロビ女性会議
- 1980年中頃~1990年初めにかけて  
DAWN・WBG・GEM-IWG・IAFFEの結成  
マクロ経済学のジェンダー化  
「ジェンダーと開発」分野の理論実践面の強化

3

## ジェンダーに中立か非対称的か

1. マクロ経済は集計的貨幣額で表現
2. アンペイド・ワークは計算外
3. ジェンダーによる固定的役割分業は無視
4. 政策効果(影響)はジェンダーにより相違
5. その無視は政策効果を減じてしまう

4

## マクロ経済の均衡

- 経済は需要と供給の関係で分析される。
- マクロ総需要(D)  
=消費+投資+政府支出+輸出
- マクロ総供給(S)  
=消費+貯蓄+税(政府収入)+輸入
- 均衡条件:  $D=S \rightarrow$  投資(I)=貯蓄(S)

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## ジェンダー予算の

### 原則と機能的枠組み

他の予算分析との違い

- 「ジェンダーの不平等」と「財政と公共部門の施策」についての知識を接合している

- 1 査定・評価の単位が世帯と同時にその中の個人
- 2 不払い労働で生産される「再生産部門」の貢献を認める

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## ジェンダーに敏感なマクロ経済の捉え方

- 有償労働・無償労働を共に考慮する
- ケアを考慮する
- 商品生産と労働力の生産を共に考慮
- 経済を4部門構成で捉える:  
ビジネス(企業)部門、公共部門  
家計(世帯)部門、非営利(NP)部門

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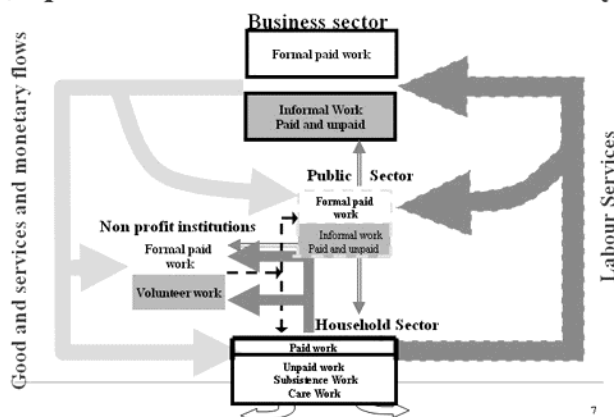
## 直接に女性を対象としない予算分析

においても成果・影響を問う

- ① 計画された、あるいは実際に生じた影響はジェンダー平等を促進したか?
- ② アウトプットは女性と男性に公平に配分されジェンダー平等を実現するのに適切であったか?
- ③ 活動は男女に平等に割り当てられるよう設計されジェンダー平等を達成するのに適切であったか?
- ④ インプットはジェンダー平等を達成するのに適切であったか?

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## Unpaid Work and the Market Economy



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## 6つの分析ツール

- ジェンダー視点に立った政策の事前審査
- ジェンダー別便益の査定
- ジェンダー別公共支出の便益帰着分析
- 予算時間利用へのジェンダー別影響分析
- ジェンダー視点に立った中期経済政策枠組
- ジェンダー視点に立った予算書

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## ジェンダー予算分析モデルの多様性



## 1 ジェンダー視点に立った政策の事前審査

### gender-aware policy appraisal

- 予算化された政策の意図された効果やジェンダー課題に与える明確なまたは潜在的な影響を審査してジェンダー平等の視点からどんな政策が必要で、その限界は何かを特定。

集計度の高いレベルの分析であるので  
→因果関係の連鎖を正確には把握できない難点

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## 2 ジェンダー別便益の査定

gender-disaggregated beneficiary assessments

- 公共サービスの供給と予算配分の優先順位をジェンダー別に査定。

公共支出を通じた公共サービスの供給についての市民の声をきく手段  
歳入面にも適用可能

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## 3 ジェンダー別公共支出の便益帰着分析

gender-disaggregated public expenditure benefit incidence analysis

- 所与の施策への支出が男女(あるいは男児女児)にどのように分配されているかを査定する手段

支出額は政府統計を参照  
利用量の推計が困難

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## 4 予算時間利用へのジェンダー別影響分析

gender-disaggregated analysis of the impact of the budget on time use

- 不払い労働がになう社会的な再生産活動がマクロ経済にどのように貢献しているかを明らかにする。
- 家計の生活時間の把握

市場生産部門 productive sector  
再生産部門 reproductive sectorの結合をめざす  
マクロ経済のジェンダー化の鍵となる方法

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## 5 ジェンダー視点に立った中期経済政策枠組み

gender-aware medium-term economic policy framework

- 男性と女性の経済活動での異なる役割を中期経済政策枠組みの中に統合
- 推定される将来の財政計画にジェンダー視点を導入する

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## 6 ジェンダー視点に立った予算書

gender-aware budget statement

- 予算から見たジェンダー状況一覧
- 政策・施策のジェンダーへの影響を事後的に監査する
- 次期の予算から期待される含意を明確にする

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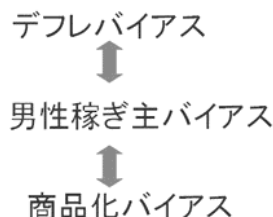
### ジェンダー予算書の指標例

- ① 総予算に占めるジェンダー平等推進本部予算の比率
- ② 総予算に占める女性のニーズを優先的に満たそうとする給付の比率
- ③ 予算に占めるジェンダー平等施策の比率
- ④ 政府部内でのジェンダー主流化予算
- ⑤ 補助金を女性が受ける比率
- ⑥ 政府の公開入札の女性落札率
- ⑦ 審議会等の女性委員比率
- ⑧ 公務員の職位・職階別の男女比率

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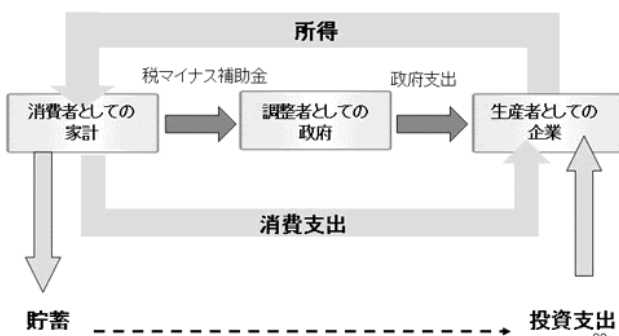
グリーバリゼーション下での社会的再生産では女性や少数派グループに権原の失敗が起こりやすい

マクロ経済政策が以下の3つのバイアスを持つため



19

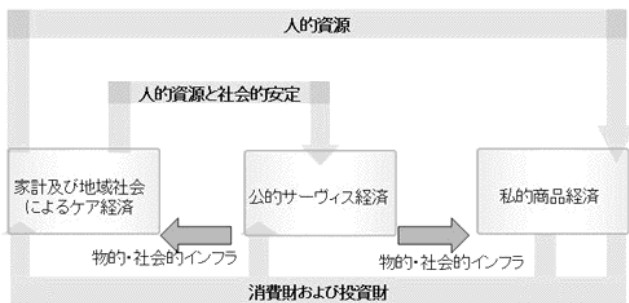
国民所得(支出)循環図:ジェンダー視点なし



20

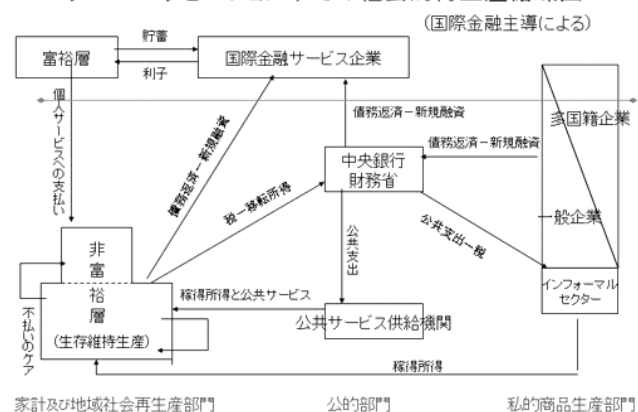


国民所得(生産)循環図:ジェンダー視点あり



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グローバル化下での社会的再生産循環図



家計及び地域社会再生産部門 公的部門 私の商品生産部門  
出所: Elson, D. and Kagatay, N. (2000). "The Social Context of Macroeconomic Policies." World Development, 28(7), p1356を修正加筆



大崎麻子  
ジェンダーと開発専門家

ジェンダーに配慮した予算:  
様々な導入点・活用事例の報告とトレーニングマニュアルの紹介

目的

1. 「政策ツール」「アドボカシーツール」としてのジェンダー予算
2. ジェンダー予算の「目的」と「導入点」
3. 「政策」「アドボカシー」に関わる様々なアクターとその役割
4. それぞれのアクターによる「ジェンダー予算」の活用法の例
5. 「ジェンダー予算」導入のためのトレーニング・メニューの例 (UNDP/日本WID基金制作のトレーニングマニュアルより)

I. 「政策ツール」としてのジェンダー予算

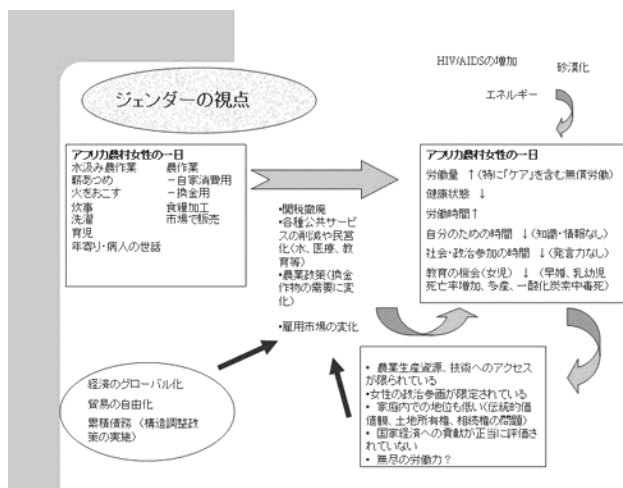
なぜジェンダー予算なのか? : 背景と目的

- ミレニアム開発目標 (MDGs) 達成のためのとり組み  
期限付き  
具体的数値目標  
人権アプローチ
- 経済のグローバル化  
● マクロ⇄ミクロ  
● 貧困の女性化  
● 援助資金の減少



目標達成のための政策策定と確実な実施

1. 開発資金・公共財源の有効活用
2. アカウンタビリティの向上 (透明性・参加促進も)



### 「政策ツール」としてのジェンダー予算： 政策のサイクル

- 現状把握・分析（問題点）
- （問題意識の共有と働きかけ（アドボカシー））
- 政策立案・ゴールの設定（解決策）
- 政策の予算化（優先順位をつける）
- 政策の実施（プログラム、プロジェクト）
- モニタリング
- 評価（有効な指標の活用、アウトプット、アウトカム）
- 次のサイクルへのフィードバック

### 「予算のジェンダー分析」の5つのステップ （UNDP・日本WID基金トレーナーマニュアルより）

1. 当該セクターにおける女性と男性、女兒と男児の状況を把握する（問題・課題設定）
2. その政策はジェンダーに配慮しているかどうか、つまり1で分析した状況に対応しているかどうか確認する（解決策）
3. ジェンダーに配慮した政策を実施するために必要な予算が配分されているか確認する（インプット）
4. 計画通りに支出が行われているかどうか確認する（アウトプット）
5. 政策と支出がジェンダー平等、男女間の公平性を推進するような形で実施されたかを検証する（アウトカム、インパクト）

## II.ジェンダー予算の「導入点」

### 「政策」における様々なアクターの役割

政府（政策立案、実施、モニタリング、評価、予算編成）  
 議会（立法、予算・財政に関する議決、国民の代表）  
 国際機関・援助実施機関（技術支援、アドボカシー）  
 市民社会組織（CSO）

- NGO（アドボカシー、ロビーイング、モニタリング）
- 研究・トレーニング機関（調査研究、トレーニング）
- メディア（世論の形成）

### ジェンダー予算の「導入点」

1. 調査研究・分析（研究機関、NGO）
2. 意識向上（一般市民、意思決定者、メディア）
3. アドボカシー（NGO、国際機関・援助実施機関、議会、政府）
4. 政策形成・分析（政府、研究機関、NGO）
3. モニタリング（議会、政府、NGO、援助実施機関）



基本導入点：

- 「ジェンダー予算」についてのアドボカシー活動
- キャパシティ・ビルディング

### トレーニング・マニュアルの紹介（UNDP・日本WID基金制作、Debbie Budlender監修）

	調査・研究	アドボカシー	モニタリング	問題意識の向上	政策立案と分析
GSBNO基本概念					
国際ケーススタディ					
予算編成のプロセス					
参加の促進					
問題・課題分析					
ジェンダー関連データ					
予算書を読みこなす					
パフォーマンス パリタリティ					
標準労働：イントロダクション					
標準労働：政策					
ミレニアム開発目標(MDGs)					
交渉術					
アドボカシー					
ワークショップの企画の仕方					



