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**NEEDS ASSESSMENT OF ECONOMIC PLANNING UNITS IN
GENDER ANALYSIS IN SELECTED CARIBBEAN COUNTRIES**

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Table of Contents

Executive summary.....	6
Introduction.....	7
Background.....	7
Country study: Belize.....	13
Background Issues	
Institutional Framework.....	16
Capacity of EPU, civil society and supporting institutions to realize integration of gender into macro processes.....	22
Recommendations.....	23
Country study: Suriname.....	25
Background Issues	
Institutional Framework.....	26
Capacity of EPU, civil society and supporting institutions to realize integration of gender into macro processes.....	32
Recommendations.....	32
Country study: Trinidad and Tobago.....	34
Background Issues	
Institutional Framework.....	35
Capacity of EPU, civil society and supporting institutions to realize integration of gender into macro processes.....	39
Recommendations.....	40
Country study: St. Vincent and the Grenadines.....	42
Background Issues	
Institutional Framework.....	43
Capacity of EPU, civil society and supporting institutions to realize integration of gender into macro processes.....	44
Recommendations.....	48
Conclusion and general recommendations.....	48
Annex I: Matrix of institutional strengthening recommendations	
Annex II: Terms of reference for consultancy	
References.....	51

EXECUTIVE SUMMARY

In its work in assisting member countries in meeting international commitments to the application of thorough gender analysis in formulating macroeconomic policy, the Economic Commission for Latin America and the Caribbean (ECLAC) has undertaken a needs assessment of economic planning units in four countries of the Caribbean: Belize, Suriname, Trinidad and Tobago and St. Vincent and the Grenadines. This paper considers to what extent these countries under study have sought to integrate gender into macroeconomic planning, and what are the institutional, human resource capacity and attitudinal factors that facilitate or hinder such integration. Based on these factors, it then outlines recommendations for conducting a course of regional training.

The introduction to the paper outlines the background to the study and its parameters, explaining the questions which the study has sought to answer. A map of each country study is then provided, as is a discussion of the theoretical justification for the integration of gender into macroeconomic policy. The needs assessment findings are then outlined, presented in the form of country studies, which themselves are presented according to (i) background issues; (ii) an analysis of the *institutional framework* within which macroeconomic planning is undertaken; and (iii) an analysis of the capacity of these institutions to support the integration of gender into macroeconomic policy, and subsequent country-specific recommendations. The report ends with some general recommendations for designing a training exercise to respond to the needs discussed.

The overall findings of the report point not only to a systematic absence of gender analysis in macroeconomic policy formulation but, in some cases, the absence of a clearly-defined planning machinery which would support the complete integration of social and economic planning processes. Even in those countries where official government documents seem to indicate efforts to consider the gender and other social content of macroeconomic policies, planning remains a largely financial exercise based more on historical monetary values than on informed socio-economic research.

However, the study discovered some promising foundations on which future efforts at integration of gender into macroeconomic policy may build, ranging from efforts at collection of time-use data in Trinidad and Tobago, to the construction of a gender-sensitive social accounting matrix in Suriname. What is crucial at this time, however, given the difficulties in capacity being experienced by economic planning units and related institutions in the region, is to focus as an initial priority on gender-aware allocation of public expenditures within the budget process, while emphasizing the importance of unifying all processes of macroeconomic planning within a gender-sensitive framework.

INTRODUCTION

Background

The Port-of-Spain Consensus adopted at the Third Ministerial Conference on Women convened by the Economic Commission for Latin America and the Caribbean/Caribbean Development and Cooperation Committee (ECLAC/CDCC) urges governments in the Caribbean subregion to engage in gender impact assessments of macroeconomic and budgetary policies, with a view not only to influencing policy responses, but also to taking full account of all the potential negative effects of the ongoing process of globalization. It further recommends the application of data on female-headed households as part of macroeconomic policy formulation. The concern for the development of macroeconomic policies which are compatible with the goals of gender equality, development and peace were restated at the Special Session on Women 2000 (the Beijing Plus Five review), where it was agreed that a gender perspective must be applied in macroeconomic and social policy development in order to ensure equal access to social services and to economic resources.

In its work in assisting member countries in meeting these commitments, and following recommendations emerging from an ECLAC/CDCC expert meeting on gender and macroeconomics, ECLAC/CDCC has developed a Gender and Macroeconomic Policies Special Project. The overall objective of this Project is to catalyse and strengthen the understanding of gender differentials in the formulation and implementation of macroeconomic policies, so as to improve gender equity outcomes in the Caribbean. The immediate objectives are to: determine the knowledge gaps in economic planning units which potentially proscribe gender-aware policy development; and to close any such gaps by building the capacity of national and regional economic planners in gender analysis and planning.

As the first activity in this project, ECLAC has undertaken a needs assessment of economic planning units in four countries of the region – Belize, Suriname, Trinidad and Tobago and St. Vincent and the Grenadines – to evaluate their capacity to integrate gender into macroeconomic planning processes. This needs assessment is to form the basis for the design and implementation of two subregional training workshops aimed at increasing the capacity of regional economic planners in gender analysis and gender planning. The study was funded by the Canadian International Development Agency (CIDA) Gender Equity Fund.

This paper considers to what extent the countries under study have sought to integrate gender into macroeconomic planning, and what are the institutional, human resource capacity and attitudinal factors that facilitate or hinder such integration. Based on these factors, it then outlines recommendations for conducting the regional training.

The research process involved interviews with key resource persons in each of the four countries. Represented in these interviews were economists, planners, directors and ministers from planning, finance and other strategic ministries; central banks; universities; the national women's machineries (NWMs); and relevant non-governmental organizations (NGOs). Also consulted for the purposes of this study were government policy documents and existing research on gender and macroeconomic policy in the region.

Parameters of the study

This needs assessment sought to answer the following questions:

What, for each country under study, is involved in integrating gender into macroeconomic policy? It was determined that in order to design training which would reflect the current status of the integration of gender into macroeconomic planning processes in the region, the study would interpret ‘macroeconomic policy’ broadly as economic policy and programme development – and corresponding resource allocations – particularly as they appear in the budget process. Where the budget process is supported by other significant planning processes, these are also assessed.

What are the organizations or institutions which support or could potentially support the work of the economic planning unit; what is their capacity to lend such support? This report sought not only to assess the capacity of government economic planning units, but also to detect the links between government economic planning units and other bodies both within and outside government. For this reason consultations were held with other government agencies, central banks, universities and civil society organizations (CSOs) to determine the level of expertise available on which government could draw, or which could possibly inform the training which ECLAC is seeking to develop. Furthermore, it must be noted that the sustained integration of gender at the macroeconomic level demands consistent monitoring by the NGO community and other extra-governmental institutions.

What opportunities for integration of gender are provided by the institutional framework in which policy is developed? The assessment also considers briefly how the budget is oriented with the country’s system of economic planning, the functions which it fulfils in the country’s economic strategy programme, and the process by which it is formulated, including the roles and competencies of the different actors involved. Also considered are the mechanisms for monitoring and social control of economic policy at the levels of both civil society and government. The purpose of this approach is to clearly differentiate institutional barriers to the integration of gender into macro planning, and human capacity gaps which may be bridged by training programmes:

What is the gap between the attitudes, levels of technical skill and theoretical knowledge required for integration of gender into macroeconomic planning, and those observed in the four countries under study?

Would training be sufficient to effect some substantial improvement in the way gender is currently integrated into planning processes, and if so, what general recommendations can be made for the design of such training?

Presentation of findings

The needs assessment findings, based on the questions explained above, are presented from Page 8 onwards in the form of country studies, which themselves are presented according to: (i) background issues; (ii) a needs assessment of the *institutional framework* within which macroeconomic planning is undertaken; and (iii) analysis of the capacity of these institutions to support the integration of gender into macroeconomic policy, and subsequent recommendations.

Box 1 below provides the chronological map of each country study. It should be noted that the subheadings are not identical within each country study, as not each country shares similar planning processes and tools. For example, the Suriname ‘institutional framework’ discussion includes a subheading which addresses the use of macroeconomic models. This is so because the economic planning unit of that country has worked and continues to work extensively with economic models as part of its planning process. None of the other country studies includes such a subsection as none appeared to be making significant use of such models in their economic planning.

Box 1

Background issues

Economic Environment: This is a general overview of the key economic indicators of each country, as well as any important information about the economic base or peculiar economic situation of the country under study. It is meant simply to orient the reader to the general economic conditions of the country in question, and to highlight information which the reader may find useful in assessing the study findings. It is by no means an exhaustive analysis of the economy being used as a basis for the needs assessment.

Overview of gender: This also provides key indicators of the status of women in each country, for example (where available) the percentage of the poor who are female. This section also highlights country-specific gender issues.

Approaches to integrating gender into macroeconomic planning: Discussed in this section are attempts to date to use gender as a category of economic analysis and/or planning.

Institutional framework

Each of the country studies includes, in addition to an assessment of tools or processes peculiar to each country (e.g. the national budget process or a multi-year development plan), a look at the following:

- The role and influence of donor organizations*
- The economic planning unit (EPU)*
- Civil society capacity and the national women’s machinery*
- Statistics*
- The national university*

Capacity of EPU, civil society and supporting institutions to realize integration of gender into macro processes

This section assesses, based on the preceding institutional framework analysis, the (i) attitudes and awareness and (ii) theoretical knowledge and technical skill of the economic planning unit, civil society and other supporting institutions to support the integration of gender into economic planning.

Box 1 (Cont'd)

Recommendations

After presenting what has been the relevant training to date in this area, and what training is expected to take place, recommendations are made for an ECLAC capacity building initiative. These recommendations are specific to:

- Primary target beneficiaries of training*
- Secondary target beneficiaries of training*
- Partners in training design and implementation*
- Primary target macroeconomic process on which training should focus for integration of gender*
- Secondary target macroeconomic process on which training should focus for integration of gender*
- Content of training*

The four country studies also vary somewhat by volume of content. The volume of content of the country studies is positively correlated not only with availability of and ease of access to information, but also with complexity of macroeconomic planning processes.

Conceptual basis of integrating gender into macroeconomic policy

Macroeconomic analysis may be described as the consideration of the interaction of a few highly aggregated markets of the economy; traditionally the labour market, asset market, and the goods market. Based on theoretical assumptions about what constitutes these markets, macroeconomists functionally specify the connections and the nature of the interaction among them, in order to be able to identify economic problems and determine what policies can be implemented to bring about conditions of growth and an increase in per capita levels of income. Of course, implicit in this process is the assumption that higher growth rates are of necessity accompanied by increased well-being. Although high growth rates are an important factor in poverty reduction and have a high positive correlation with many indices of human development, they do not ensure an equitable distribution of income to all sectors of society. This is evidenced by many regional examples of moderate to high growth rates accompanied by worsening poverty levels.

In identifying GDP as an economic target, governments usually pursue three types of policy objectives: a balanced foreign sector, full or high employment and low inflation; for which they make use of three instruments: exchange rate policy, monetary policy and fiscal policy. It is the interrelation of gender and fiscal policy on which this paper focuses.

The gendered division of labour, which sees women primarily responsible for reproductive work, and men for productive work¹, also has macroeconomic implications. Cagatay, Elson and Grown (1995a) assert that 'free market' economies, as socially constructed institutions, reflect and perpetuate gender inequalities in their failure to capture unpaid

¹ Productive activities are those income-generating activities generally associated with the formal market, whereas reproductive activities are associated with the household and involve the care and development of people. It is biological differences which dictate that women give birth to children, but it is socially-constructed gender relations which account for women being primarily responsible for unpaid, reproductive activities.

reproductive work as an economic activity. Such work must be made visible if gender biases are to be removed from economic planning.

The structural adjustment policies of the 1980s and 1990s demonstrated the economic value of reproductive and voluntary work, and its link to productive sectors. The primary objective of these programmes was to increase the capability of the market system to respond to signals by eliminating structural and institutional rigidities that inhibit market adjustment. Such rigidities included government intervention through subsidies and protectionist trade policies which, it was thought, maintained balance of payment crises by distorting relative prices and thus inhibiting the allocative function of the market. With the subsequent decreases in public investment in health, education and other social services, costs, (in the form of increased women's labour and time use), for provision of discontinued government services were shifted to the (invisible) reproductive sector. Therefore, as Elson (1995) observes, forced savings at the macroeconomic level assumes 'forced-labour' in the reproductive sector, with repercussions manifested in the disintegration of the health and social cohesion of the population. This, in turn, may require the restoration of government intervention through public expenditure on social services, returning the economy to the very situation in which contractionary policies were thought to have been necessary.

Moreover, there is growing research indicating that gender biases and inequalities in income and asset distribution, the labour market, in access to credit and in decision-making could hamper the effective and productive use of human resources in meeting human needs. Research on economic growth and education shows that failing to invest in education lowers gross national product (GNP): everything else being equal, countries in which the ratio of male to female enrolment in primary or secondary education is less than 0.75 can expect levels of GNP that are roughly 25 per cent lower than countries in which there is less gender disparity in education.²

Research on gender inequality in the labour market shows that eliminating gender discrimination in occupation and pay could increase not only women's income, but national income. For instance, if gender inequality in the labour markets in Latin America were to be eliminated, not only could women's wages rise by about 50 per cent, but national output could rise by 5 per cent.³

Gender inequality also reduces the productivity of the next generation. The World Bank reports mounting evidence that increases in women's well-being yield productivity gains in the future. The probability of children being enrolled in school increases with their mother's educational level, and extra income going to mothers has more positive impact on household investment in nutrition, health and education of children than extra income going to fathers, which tends to be skewed towards leisure commodities and goods that are status symbols.⁴

In terms of agricultural production, research shows that reducing gender inequality could significantly increase agricultural yields, and this is especially significant for many agrarian Caribbean territories such as Saint Lucia and Saint Vincent and the Grenadines. For instance, Santos (1996) found that giving women farmers in Cuba the same level of agricultural inputs and

² Hill and King, 1995

³ Tzannatos, 1997

⁴ World Bank, 1997

education as men farmers could increase yields obtained by women farmers by more than 20 per cent.

While it is true that policy interventions which promote equal access of men and women to resources often need to be made at the micro and meso levels – e.g. education and job training; and legal and institutional reform of policies which prevent or disadvantage women's participation in economic activity – such interventions must be reinforced by gender-aware macroeconomic planning, for which fiscal policy provides a sound entry point. Gender may be integrated into macroeconomic models, medium term planning processes, specific development strategies such as poverty strategies, or in the budget process.

Budget analysis

Gender analysis of government expenditures may seek to answer such questions as:

- How is spending prioritized: how much is to be spent, on what and why?
- How will the work of the household economy be supported/hampered through this form of expenditure?
- Who will benefit in terms of: (i) access (ii) employment?

Similar questions may be asked with regard to the revenue side of the budget, such as taxes and user fees:

- To what extent will these measures discourage/encourage women's participation in the labour force?
- How will these measures affect access to services (e.g. through user fees)?
- What will be resulting effects on patterns of income, consumption, and unpaid labour time use?

BELIZE

Economic environment

Belize⁵ is a small, open economy whose principal sectors are tourism, shrimp farming, and agriculture (citrus, sugar, and bananas), and which has been and continues to be vulnerable to exogenous and weather-related shocks, as well as declining preferential market access. Inflation remained at about 2.5 per cent in 2003, while growth has been estimated at 5.5 per cent. The strategy of government for accelerating economic growth has been high public investment of government resources and expansionary monetary policies. The fiscal deficit has been predicted to reach 8 per cent of Gross Domestic Product (GDP) in the current fiscal year. Public debt rose above 90 per cent of GDP by the end of 2003, while the external current account deficit is at about 16 per cent of GDP. The central government deficit is being financed mainly through considerable external borrowing, which has led to decreased access to capital markets.

In Belize, central government deficit is being financed mainly through substantial external borrowing, while the national budget calls for a reduction of this deficit from around 8 per cent of GDP in the previous year to below 3 per cent of GDP. Public and publicly-

⁵ The population of Belize is estimated at between 260,000 and 270,000.

guaranteed debt now stands at around 92 per cent of GDP, with the debt-service ratio estimated at 13.6 per cent. The government is currently undertaking large-scale debt-refinancing in order to alleviate the debt burden. Debt-servicing obligations have been caused largely by imperatives of the Development Finance Corporation (DFC). Taking into account the public sector wage bill and subsidies to the DFC, it is estimated that only 18 per cent of current expenditure can be devoted to goods and services, creating considerable constraints to the work of the social sectors.

Overview of gender in Belize

Of the 33 per cent estimated poor in Belize, a larger percentage of female- than male-headed households are said to live below the poverty line⁶. Health sector reform efforts have seen some improvements made in the area of women's health and well-being, but critical issues remain. Problems related to reproductive and sexual health are the leading causes of morbidity and mortality among women aged 15 – 44, while the country is also experiencing a feminization of the HIV epidemic: greater numbers of women than men are now testing positive for Human Immunodeficiency Virus (HIV), leading to a narrowing of the rate of infection between men and women. A Health Sector Reform Programme based on decentralization of the health system and the implementation of cost recovery mechanisms for curative services is currently underway.

The trend of higher male than female repetition and dropout rates at the secondary level has been an issue of some concern among policy makers in Belize, and is considered by many as the true manifestation of the 'gender issue'. However, the higher completion rate of women at the secondary level, and the matriculation of more women than men in post-secondary education⁷ are not reflected in formal labour market trends. The female unemployment rate⁸ is now roughly twice that of men, and the female labour force, though more highly educated than the male labour force is less well paid. In 1998, the female labour force participation rate was one half that of men, (78.6 per cent for men and 39.6 per cent for women).⁹

Approaches to integrating gender into macroeconomic planning

The Government of Belize, having ratified the Convention on All Forms of Discrimination against Women (CEDAW), has committed to improving the status of women in Belize. A Women's Agenda was created in 1998 as part of the government's electoral manifesto, and the National Women's Commission developed a National Gender Policy which was approved in 2003. Also created were a National Strategic Plan on Gender Equity and Equality to implement commitments made under the Beijing Declaration and Platform for Action, and a Gender Integration Committee to facilitate the mandate of gender policy development assumed by the Women's Department. The National Women's Commission, established in 1982 as an Advisory Body to the Government and now responsible for monitoring

⁶ June 2002 Poverty Assessment Report carried out by Kairi Consultants Ltd. The document reports that 23.6 per cent of male-headed households and 30.5 per cent of female-headed households experience poverty.

⁷ Haylock (2004) has observed that those women matriculating from the University of Belize are much older women who work in the formal labour market, perform reproductive work in the household, and attend University part-time, whereas the men matriculating are of standard University age. This finding, she argues, sheds new light on the access of University age women to post-secondary education.

⁸ This has ranged in recent years between 14 per cent and 20 per cent while that of males ranges between 8 per cent and 9 per cent.

⁹ Adele Catzim, "Women in Belize: Moving into the New Millennium.", April 1999.

the activities of CEDAW, sits along with the Women's Department, NGOs and international bodies on the Committee.

The formulation of the National Strategic Plan on Gender, Equity and Equality was based on a series of popular consultations, and identified health, education, violence, economic empowerment, and power and decision-making as priority areas of action. The Gender Policy was developed in an attempt to further implement this plan. This Policy represents a rather comprehensive review of the laws of Belize, and offers general recommendations for advancing gender equity and equality in the areas of health, wealth-creation, gender-based violence and education. However, while there is some discussion of women's economic opportunities, access to credit and the progress made to date in attempting to value unpaid work, there is no strategy presented for the integration of gender into macroeconomic planning processes. The following reference is made to gender-sensitive budget analysis, but no actions are recommended:

- Government will institute – by 2004 – a unified central mechanism for incorporating gender analysis into the budget-setting process.
- The Women's Department will institute – by 2004 – a formalised process for producing a gender-based analysis of the annual budget.¹⁰

Belize has also implemented the Commonwealth Secretariat Gender Management System (GMS) of gender mainstreaming, which involves the integration of gender analysis into the mainstream of decision-making and action at all levels by government, civil society and other stakeholders. The Women's Department has established gender focal points in certain sectoral ministries, but, as has been documented for the subregion as a whole, these have played a weak role in gender-responsive policy planning due to inadequate training and the relatively junior positions which they occupy. The Department has also facilitated training of public officers in gender mainstreaming, but the system has been unsuccessful in institutionalizing the integration of gender into macroeconomic policy.

Systemic constraints of understaffing and lack of resources also limit the functioning of the local bodies (mentioned above) which are responsible for the monitoring of government commitments to gender equity and equality. Further, both NGOs and the national women's machinery tend to give precedence to grassroots programmes over policy level work and this may account for the lack of recognition within the country's structural macroeconomic policy framework of the differential impact of policy and allocation decisions on women and men.

However, there have been some successful and highly visible initiatives undertaken through government/civil society partnerships. The Women's Issues Network of Belize (WIN Belize) and other civil society organizations have worked closely with the Women's Department in lobbying for and ensuring legislation on equal pay for work of equal value. This has seen the establishment of one minimum wage for both male and female-dominated jobs, where previously the wages were differential in favour of male-dominated jobs. The NGO community has also been instrumental in the creation of a reformed Domestic Violence Act, Protection from Sexual Harassment Act and Families and Children Act. There has also been the establishment of a

¹⁰ Johnson, Robert (2002), National Gender Policy: Belize, National Women's Commission, Belize pg 68.

Domestic Violence Task Force and a multisectoral National Family Violence Plan. The Supreme Court of Judicature (Amendment) Act, 2000 and the Administration of Estates (Amendment) Act now recognize common law unions and provide guidelines for the distribution of property in divorce or separation.

The Women's Department is also currently implementing a United Nations Development Fund for Women (UNIFEM)-supported gender budget initiative (GBI), which focuses on a gender analysis of the institutional framework in which the budget is developed, as well as an ex-ante analysis of the National Poverty Elimination Strategy and Action Plan (NPESAP). The first phase of this project had formed part of the Commonwealth Secretariat Gender Budget Initiative Pilot Project in the Caribbean, which also included Barbados and St. Kitts/Nevis. This phase lasted three weeks in Belize and involved a visit of an expert from the Commonwealth Secretariat who undertook an analysis of the recurrent expenditures of the national budget of 2000-2001. The follow-up to this initial phase was undertaken by UNIFEM at the request of the Government of Belize, and has been endorsed by Cabinet.

Institutional framework

The most recent budget address made by the Government of Belize acknowledged the importance of balancing economic growth and social equity. However, a systematic planning process needs to be put in place to ensure that this balance can be achieved. In recent years, a National Development Plan (1990-1994) was produced by the then Ministry of Economic Development¹¹ but this effort has not been sustained. The unsustainable nature of the National Development Plan as a planning tool has been attributed to, among other things, a lack of funds for implementation. There were also efforts by the government in 2000 to develop a National Human Development Agenda (NHDA), based on multi-sectoral consultations.

Belize also produces biennially – for submission to the World Bank – a Medium Term Economic Strategy (MTES), for whose development the Ministry of National Development is primarily responsible. The document represents a compilation of all the projects and programmes already underway in each line ministry, furnished with some discussion attempting to tie them all together into an economic plan. A need to include specific, quantifiable targets which can assist government planning institutions in achieving economic development goals has been identified. Clearer linkages between the MTES and the national budget development exercise also need to be established.

The budget process is guided by the election Manifesto of the ruling party, with input from sectoral ministers. This results in a lack of coordination across ministries. A recent Management Audit of Government Ministries and Departments¹² also reports a general failure of planners to set performance targets and programme monitoring systems, and the absence of assessments which capture the socio-economic impacts of shifting government priorities.

Another body established with responsibility for setting economic targets is the National Economic Council, chaired by the Prime Minister as Minister of National Development and

¹¹ The name of this Ministry was changed in 2003 to the Ministry of National Development to reflect the added responsibilities of international cooperation and governance.

¹² Government of Belize, "Report of the Management Audit Team", April, 2004

assembled in response to requirements of the Department for International Development (DFID) Commonwealth Debt Initiative (CDI). The Council, which reconvened in 2004 after having been inactive for some time, includes representatives of the Cabinet, the private sector, the Central Bank and civil society. Its main objective is to bring about “broad-based” job-generating economic growth through investment in trade and export-promotion, poverty reduction and institution strengthening for better governance. As a first step in realizing this objective, the Council plans to review “Belize’s performance under the current [Medium Term Economic] strategy – which covers the three-year period ending 2005 – ...and over the next several meetings... engage in a discussion of the next Medium Term Economic Strategy, and as well to consider the efficacy of an even longer planning framework.”¹³ The Ministry of National Development is to provide the research and policy recommendations which will guide the decision-making of this body. It provides an entry point – through the research to be done by that Ministry – for integration of gender-aware planning processes.

The national budget process

The annual budget process is coordinated by the Ministry of Finance, which produces the Approved Estimates of Revenue and Expenditures. In response to a “Budget Call” made by the Ministry of Finance, line ministries submit their respective budget estimates, which are meant to form the basis for consultations between the Ministry and representatives of sectoral ministries. During these consultations, line ministries are meant to discuss the level of priority of each programme, in the event that the funding requested cannot be provided in its full amount. The practice of involving the Ministry of National Development in these discussions was discontinued with the recent restructuring of the Ministry of Finance.

The “Budget Call” for the fiscal year 2004/2005 reminded all accounting officers “that the entire budget process is geared to priority funding of those government programs that best fit the national development priorities of Belize. Each Ministry is required to separately identify – and design programmes to address – what it sees as priorities based on the Manifesto of the ruling Party and Cabinet directives. financial analysts within the Ministry of Finance check each budget proposal for compliance with financial guidelines, and then engage in a budget balancing exercise in which they are guided by “a.) financing guidelines sent to them from the Central Bank, b.) estimated revenue for the fiscal period, c.) an analysis of past expenditures of each Ministry, d.) the need to prioritize on-going rather than new programs and projects which have to be completed in the upcoming fiscal period, e.) approved permanent establishment posts, f.) major Cabinet decisions which have financial implications and g.) the input of the Minister of Finance.”¹⁵

The current fiscal targets of the country involve the increase of revenue collections by 2 per cent of GDP, and the reduction of the fiscal deficit from 8 per cent to 3 per cent. In its attempts to maximize revenue, the GOB has been engaged in an aggressive process of disinvestment, having privatized the majority of publicly-owned enterprises. Central government

¹³ Address by Prime Minister of Belize, Said Musa, at the Official Opening of the Belize Business Bureau’s Belizean Producers Convention and Exhibition July 23, 2004

¹⁵ UNIFEM 2004 (Draft), “Gender-Aware Policy Appraisal of the Budgetary Institutional Framework of Belize” (provisional title).

deficit is being financed mainly through substantial external borrowing. Public and publicly-guaranteed debt now stands at around 92 per cent of GDP, and the government is currently undertaking large-scale debt-refinancing in order to alleviate the debt burden. Clear linkages between these policies and other types of planning such as the MTES and NPESAP need to be established.

The budget process in Belize, as in many the Caribbean Community (CARICOM) countries, represents a system of incremental/line item budgeting. Within such a system, emphasis on budgetary allocation (rather than programmes) is based on the nature of expenditure and not on the purpose. It assumes that every expenditure line in the budget is essential, and a certain percentage is added to the previous year's estimates to obtain those of the current year. Belize has nevertheless participated in financial and budget reform initiatives¹⁶ and the Government of Belize has indicated its intention of progressing to a programme budgeting system. Programme budgeting, also called "performance budgeting" or "outputs-based budgeting", is a systematic approach to public expenditure allocation which seeks to relate *resources to results*¹⁷.

Unlike incremental budgeting, which provides little opportunity for analysis and monitoring of the integration of gender, there are certain key elements of a programme budget which allow for interventions with respect to gender, poverty, ethnic and geographical origin and other concerns. A typical programme budget proposal from a line ministry will contain a narrative programme justification statement; a medium-term expenditure table linking revenues, operating costs and personnel requirements and capital estimates; and a log-frame showing yearly progress against objectives by *programme* indicators rather than *financial* indicators only. Such a transition in Belize would provide an important opportunity for the integration of gender-specific monitoring indicators and assessment; the discussion of how sectoral and macroeconomic policies promote gender equity and equality; and would foster civil society participation.

The role and influence of donor organizations

International donor organizations with current portfolios in Belize include the Caribbean Development Bank (CDB), the Inter-American Development Bank (IDB) and the DFID. The CDB and IDB are sources of funding for many of the same projects¹⁸, including the Health Sector Reform Project. The funds offered by the banks focus on the modernization of the agriculture sector, disaster preparedness, and the establishment of infrastructure such as roads. In addition, the CDB has sponsored programmes providing training at the community level, while the IDB has supplied technical cooperation for studies into strategies for poverty reduction.

The DFID programme in Belize focuses on debt relief under the CDI, as well as on the facilitation of negotiations in the Belize/Guatemala border dispute. DFID has identified three

¹⁶ In 1997, The European Union and the United Kingdom Department for International Development provided funding for a financial reform project, which to date has involved computerization of the line item system rather than implementation of a system of programme budgeting as was intended. Belize is also currently participating in a Commonwealth-Caribbean Program Budgeting Project.

¹⁷ Zafra (2003) provides a programme budgeting primer in Economic Development and Research Center Periodical No. 3 "Economic Policy and Poverty"

¹⁸ These projects are executed under the Social Investment Fund and the Basic Needs Trust Fund.

criteria for debt relief: poverty reduction, sound macroeconomic management and good governance, which includes anti-corruption measures and an improvement in transparency and accountability.

The establishment of a mechanism for government coordination of international donor portfolios would be a useful entry point for integrating gender into planning processes, since it would provide a central location for matching donor projects to the goals of economic development, as well as for ensuring that these projects equally benefit men and women.

The economic planning unit: the Ministry of National Development

The Ministry of National Development, headed by the Prime Minister of Belize as coordinator of the country's Public Sector Investment Programme (PSIP), monitors the progress of government investment and makes recommendations for further investment. It also manages donor-funded programmes, is responsible for issues of governance; and – through its chairmanship of the National Human Development Advisory Committee (NHDAC) – conducts social and economic research. This new ministry is currently engaged in a planning process to further clarify its roles and functions. The Ministry, as Chair of the NHDAC, is also charged with reworking the NPESAP of Belize.

Civil society capacity and the National Women's Machinery (NWM)

The Ministry of Human Development, Women, Children and Civil Society, in which the Women's Department is located, has a long history of working with civil society. As previously discussed, the Women's Department has partnered with NGOs for the successful completion of several advocacy and training initiatives. The Department also established the Gender Integration Committee (GIC), which although actively represented initially by NGOs, international organizations and the national Women's Commission, has dwindled to a handful of researchers. Nonetheless, the GIC has completed a training manual for government officers, aimed at increasing gender sensitivity and facilitating the integration of gender into public policy-making.

Currently, the Women's Department is understaffed and lacks policy personnel. The Department seems to be regarded by other government agencies more as a 'welfare' institution' rather than one responsible for making policy recommendations. Belize appears to be also experiencing a loss of momentum not only in the women's movement, but in civil society organizations as a whole. Of the CSOs still in operation, WIN Belize and the Society for the Promotion of Education and Research (SPEAR) are perhaps the best resourced and most visible.

WIN Belize may arguably be considered more as an umbrella organization of NGOs than a women's issues network¹⁹; however the organization is one of the few still active in the

¹⁹ The current members of WIN Belize are the Young Women's Christian Association; Young Men's Christian Association; Youth Enhancement Services (for young women); Belize Enterprise for Sustainable Technology, Help for Progress; Plenty International; Belize Family Life Association; Belize Organisation for Women and Development; Belize Red Cross; National Organisation for Prevention of Child Abuse and Neglect; Haven House (shelter for battered women); Chairladies Fajina Association (indigenous women's group); Society for the Promotion of Education and Research; Women's Department; National Women's Commission; Human Rights Commission of Belize; Trade Union Congress of Belize; and Cotton Tree Women's Group. The majority of these organisations are not actively involved in the network.

country, and has expressed a commitment to the advancement of women in Belize. The recent work of WIN Belize has focused on developing its guide for the definition of gender in the Belizean context, and outlining a strategy for the integration of this guide into public sector programmes. This project was carried out in collaboration with WIN's member agencies, other NGOs, and government. WIN Belize has also carried out countrywide gender mainstreaming workshops, but is typical of the NGO sector in Belize in that it has very little capacity to inform government macroeconomic policy-making.

SPEAR is a non-government, non-partisan and not-for-profit membership organization in Belize, whose mission is "to empower people to struggle for justice, democracy and sustainable development." Starting in 1992, SPEAR decided to shift emphasis from the micro to the macro levels with the belief that there was more benefit from activities that impacted on national policies affecting the entire society. Their activities fall under three programme areas: a Community Empowerment Programme, an Advocacy Programme and a Public Education and Information Programme. Recently, SPEAR has been encouraged by DFID to participate in the CDI dialogue, and in this capacity has produced for DFID a report on the 'poverty' and 'governance' criteria which forms part of the Initiative assessment. It should be noted, however, that the organization suffers reduced capacity in its core of researchers, and is now in the practice of contracting international consultants to carry out its research needs.

A recent assessment of civil society organizations' capacity to influence and monitor public policy identifies "a number of constraints...as challenges to CSOs' effectiveness: institutional weaknesses, shortage of capable human resources especially in key areas of leadership and advocacy, and ineffective CSO/State mechanisms for representation and influence".²⁰

Statistics

The Central Statistical Office of Belize (CSOB) provides sex -disaggregated data through the National Census, the annual Labour Force Survey; and the Family Health Survey, which has been conducted twice since 1991. These together constitute a comparatively sound foundation for the further development of indicators which may form the basis of gender-sensitive policy formulation. Such development is being undertaken by the Social Indicators Committee (SIC), an arm of the CSOB reestablished in 2003 and currently engaged in a number of capacity-building initiatives. Among these is a project to develop a cohesive set of social, environmental and gender indicators, as well as the development of a computer-based information network to facilitate planning across Ministries and Departments. The SIC participated in early 2004 in a two-day Pan American Health Organization (PAHO)-sponsored workshop on gender and health indicators, the information from which the Committee intends to adapt for application to other sectors. It has also attended CARICOM workshops which have addressed the importance of gender-disaggregated data.

²⁰ ANDA, SPEAR, UNDP, July 2003. "Civil Society Organisations in Belize: A Rapid Assessment of their Capacity to Influence and Monitor Public Policy"

However, the CSOB sees its first priority as ensuring the accuracy, reliability, usefulness and timely distribution of the information²¹. Delays in information sharing contribute to lack of data use in the planning exercises of government ministries and departments, which subsequently impacts the effectiveness of projects and programmes targeted at specific populations, including women. They also limit government and civil society capability to monitor projects and programs, as well as the documentation of best practices and lessons learnt.

The University of Belize

The University of Belize was established in 2001, and currently offers three Economics courses within its Department of Management and Social Sciences. There is no degree programme in Economics or Public Finance and little research is carried out in these fields by the faculty. The Department is also not usually publicly vocal in assessing the economic policy of government.

The Department has, however, agreed to engage in consultations with the gender budget group (GBG) created out of UNIFEM's gender budget initiative on the inclusion of literature on gender and macro planning in its social policy course.

Capacity of EPU, civil society and supporting institutions to realize integration of gender into macro processes

EPU

The role of the Ministry of National Development in the budget process as an economic planning unit (EPU) is limited, since much of the decision-making in terms of resource allocation takes place within the Ministry of Finance. Substantial training addressing the integration of gender into economic planning has not taken place within either of these two ministries. Currently, the only auditing of programmes being undertaken is of a financial nature.

Attitudes and awareness: The Ministry of National Development is a member of the small Gender Budget Working Group formed as a part of the UNIFEM GBI. The formulation of the NPESAP, an analysis of which constitutes the next phase of the GBI, is one of the primary responsibilities of the Ministry. Given this responsibility, as well as the efforts to increase the Ministry's role in macroeconomic planning, it is recommended that planners from this Ministry participate in the ECLAC capacity building initiative.

The Ministry of National Development has acknowledged the importance of gender-aware planning, and has for some time been seeking ways in which to develop capacity in this area. However, most of the directives relating to fiscal policy originate outside of the ministry and technical staff is then responsible for providing research to support such directives, or for their implementation. Their input into macro policy formulation is therefore limited and while staff welcomes the opportunity for training in gender-aware macroeconomic planning, a need for

²¹ Government statistics must be approved by the Minister of Finance before they are officially disseminated and used for planning purposes. The timeliness of the dissemination of data is therefore dependent on this approval process.

institutional mechanisms for planning to allow greater participation of the Ministry of National Development has been identified.

Theoretical knowledge and technical skill: Resource interviews revealed a high level of basic knowledge of the interaction of gender and macroeconomic processes among top level planners, but no technical skills for their integration. Among technical staff, however, there appears to be a need for basic training in gender as a cross-cutting development issue, as a precursor to any specialized training on gender and macro policy.

Civil society

Attitudes and awareness: Civil society organizations in Belize are highly aware of the importance of gender content in macroeconomic policies, and welcome training which will equip them to monitor such content in government policies.

Theoretical knowledge and technical skill: There is a small group of local experts affiliated with CSOs who possess great theoretical knowledge of gender and development issues. However, there is very little specialized expertise regarding gender-aware planning processes. Furthermore, although there have been government/NGO partnerships on past projects, there is no institutionalized tradition of government/NGO consultation which would allow capacity built in civil society to directly affect government planning processes such as the budget process. Nonetheless, civil society should be included in the ECLAC capacity building exercise in order to create a base from which monitoring can be carried out.

Supporting institutions

Attitudes and awareness: The impetus for the currently underway gender budget work as well as for similar previous initiatives has come primarily from the Women's Department, the national women's machinery (NWM) of Belize. The NWM has been extremely proactive in obtaining government commitment at the Cabinet level for such initiatives, but has so far not succeeded in generating a like degree of interest and political will across government, whereas the University of Belize is willing to consider integrating a gender perspective into its work, some key supporting institutions generally²² have not displayed high levels of interest.

Theoretical knowledge and technical skill: The NWM and GIC have prepared training manuals on gender and public policy, based on their knowledge of gender and development. However, both the NWM and supporting institutions lack specialized expertise regarding gender-aware planning processes.

Recommendations

The currently underway UNIFEM gender budget initiative (GBI) represents the most immediate opportunity for gender to be integrated into macroeconomic planning in Belize.

²² There are some important exceptions: the Ministry of Human Development, in which is located the NWM, is committed to analyzing its programmes, as far as it is able, for potential gender impacts. The Ministry of Rural Development also recognizes the importance of such analysis. It should be noted that not all line ministries were consulted in this assessment, and that these remarks represent a general impression of government attitudes to gender at this time, based on the sample resource interviews carried out.

However, this initiative is greatly constrained by the weakness of civil society, the limited capacity of the NWM, and the fact that there exists no clearly-defined process of macroeconomic planning in the country. Nonetheless, it is recommended that a partnership be forged between the UNIFEM GBI and the ECLAC Special Project, in order to take advantage of the dialogue already underway among government and civil society with respect to gender and macroeconomic policy.

The training of government officials in the economic planning unit of Belize is a necessary condition, though not the only one, for the integration of gender into the budget process. However, insofar as it would supplement the work of the UNIFEM GBI, it would certainly serve to advance the efforts of the Women's Department in bringing about such integration.

Training to date

- The SIC participated in early 2004 in a two-day PAHO-sponsored workshop on gender and health indicators. It has also attended CARICOM workshops which have addressed the importance of gender-disaggregated data.
- The NWM and WIN Belize have carried out countrywide gender mainstreaming workshops, the NWM has conducted gender sensitization workshops with Cabinet and senior policy-makers.
- The UNIFEM GBI project has conducted two introductory workshops in gender budget analysis for government and NGOs.

Future training

The Social Investment Fund (SIF) of Belize, a part of the Ministry of National Development, expects to participate in gender training sponsored by the CDB.

Recommendations for ECLAC capacity building

Primary target beneficiaries	Economists from Ministry of Finance and Ministry of National Development; Gender Integration Committee; NWM
Secondary target beneficiaries	Line ministry planners; CSOs
Duration	
Partners in Design and Implementation	UNIFEM Caribbean; NWM; Gender Integration Committee
Primary target macroeconomic process	Public expenditures as they relate to the NPESAP
Secondary target macroeconomic process	All other public expenditures of budget process
Content	Module I: Review of public expenditure management system (PEMS) of country; relation of budget process to policy and to NPESAP
	Module II: What is gender analysis and why does it matter?
	Module III (relate Modules I and II): Tools for integration of gender analysis into PEMS and NPESAP

SURINAME

Economic environment

The economy of Suriname²³ is based on the export of alumina and small amounts of aluminum produced from locally-mined bauxite. Alumina exports accounted for 72 per cent of Suriname's estimated export earnings of \$496.6 million in 2001. However, the country's major mining sites are maturing, and it is now estimated that their reserves will be depleted by 2006. Other proven reserves are estimated to be sufficient to last until 2045, but distance and topography represent barriers to their immediate development. Suriname also exports rice, shrimp, timber, bananas, fruits, and vegetables. Gold mining is unregulated by the government, but is a very important part of the informal economy.

Central government is large and employs over 50 per cent of formal market workers, prompting calls for public sector reform to improve efficiency. GDP growth rate in 2003 was 1.5 per cent, up from 1.2 per cent in 2002. Following two episodes of hyperinflation in recent years, accompanying in one instance devaluation of the exchange rate by more than 35 per cent (in 2003), the Government of Suriname has once again initiated a restabilization programme. The difference being highlighted between this new restabilization plan and the structural adjustment measures of 1993-1995, is a focus in this new plan on sustainable human development. The Government of Suriname is reportedly developing a pro-poor growth programme within the framework of restabilization and good governance.

Overview of gender in Suriname

A UNIFEM-conducted situational analysis of women in Suriname reports little access of women to land tenure and housing. Women experience higher unemployment than men – comprising one third of the formal market employed population – and are mainly employed in low-paid administrative and service professions. Although there is high female participation in agriculture²⁴, the second largest productive sector in Suriname, unwaged women farmers are not counted in national statistics. The informal market is a growing one in the country, due mostly to women's home-based businesses.

Reproductive health and sexual rights are also areas of concern, with high rates of maternal morbidity, and of mortality, due to breast and cervical cancer.

Approaches to integrating gender into macroeconomic planning

The Ministry of Home Affairs, in which the Bureau of Gender Affairs is located, has developed an Integrated Gender Action Plan for 2000-2005 which was formulated based on consultation with NGOs, and includes both NGO and government projects. The Plan is seen as a positive step toward the establishment of an integrated government approach to gender equality goals. At the time of this study, resources had not yet been allocated for its implementation. For the disbursement of its aid package as discussed in the following section, it is a requirement of

²³ The population of Suriname is approximately 431,303 (2002 est.).

²⁴ High percentages of women in the interior and rural areas are unwaged agricultural workers.

the Dutch Embassy ‘that gender be contained’ in sectoral plans. Thus far, agricultural, health and housing plans have been developed, while education is now being formulated. A gender analysis of the agriculture sector plan has been carried out, and there are plans for such analysis to be done of each plan to follow.

Institutional framework

The role and influence of donor organizations

At independence, Suriname signed an agreement with the Netherlands providing for about \$1.5 billion in development assistance grants and loans over a 10- to 15-year period. Dutch assistance allocated to Suriname thus amounted to about \$100 million per year, but was discontinued during periods of military rule. After the return to a democratically elected government in 1991, Dutch aid resumed. The Dutch relationship continues to be an important factor in the economy. In 2000, the structure of the aid package was revised and disbursement of aid commenced according to sectoral priorities as opposed to individual projects.

The Economic Planning Unit: the Ministry of Planning and Development Cooperation

The government ministry responsible for economic planning in Suriname is the Ministry of Planning and Development Cooperation, within which the General Bureau of Statistics (GBS) and the National Planning Office (NPO) are located. The NPO had existed prior to the establishment of the Ministry of Planning and Development Cooperation as Suriname’s only government planning body, and was then incorporated under the Ministry of Planning and Development Cooperation as a parastatal organization which reports to the minister, but has a high degree of autonomy. The NPO is responsible for developing the Multi-annual Development plan (MDP), and the annual development plan, which consists of the Public Sector Investment Programme (PSIP). It also produces research for and publishes the sectoral plans. The core part of the ministry is mainly responsible for providing financial resources and contracting technical assistance to develop sectoral plans, and for coordinating donor-funded projects. It can be said then that the NPO is responsible for macroeconomic planning, and the rest of the ministry for coordinating development cooperation.

The Multi-Annual Development Plan and sectoral plans

In Suriname, elections are held every five years, and the development planning period roughly coincides with each government's term in office. The planning process takes place at the beginning of each new five-year administration period, and the output of this process is a draft five-year Multi-Annual Development Plan (MDP) which lists the socio-economic objectives of the country and includes budgetary considerations.

The initial step in the development of the MDP is the review of new developmental trends in the regional and international community, which are assembled in policy papers and offered to government and civil society for comment. Sectoral plans are then developed based on the MDP. The sectoral plans were created in response to a decision by Dutch donors to revise the structure of their aid package and disburse aid by sectoral priorities as opposed to individual projects. Extensive consultations are carried out with both line ministries and civil society in the development of these plans, which are coordinated by the NPO to support the reduced capacity

of planning units in line ministries. The move toward sectoral planning also seeks to discourage the practice among line ministries of implementing donor-driven projects which have no programmatic links.

Challenges in macroeconomic planning

The Ministry of Planning and Development Cooperation is attempting to undertake donor coordination of projects funded by the Dutch Embassy Treaty Fund, the European Union (EU), the United Nations and the IDB. Responsibility for these projects is now divided across the Ministry of Planning and Development Cooperation, the Ministry of Finance and the Ministry of Foreign Affairs. It is also hoped that the new sectoral plans will bring about more effective implementation of the MDP, which in previous years has suffered from lack of implementation and execution.

Another challenge in planning is the formulation of sector fund guidelines to develop a financing modality for sectoral plans, a process also involving the Ministry of Finance. However, there is a lack of technical capacity in this area, and at the time of this study the Ministry of Planning and Development Cooperation was coordinating a mission to Washington to learn best practices. Resource interviews also revealed a need for the Ministry of Finance to deepen its understanding of the programmatic side of macroeconomic planning, as programme management requires justification of the way in which finances are managed.

Linkages between macroeconomic planning in which the NPO is engaged and social planning are lacking and gender is also not integrated into the macro-planning process. This is further discussed under 'The Use of Macroeconomic Models'. Moreover, the implementation of government plans and budget are constrained by *inter alia* a lack of indicators and time-bound, measurable targets..

National budget process

The national budget development process of Suriname is concentrated within the Ministry of Finance and involves a three-year rolling budget plan that starts with a preliminary unbalanced budget for three years. The year-to-year process sees the allocation of resources across ministries on a historic base as well as according to government priorities as laid out in the MDP.

The multi-level bilateral consultative process involves government planners; line ministries, the Ministry of Finance and the President, but no inter-ministerial collaboration. In these consultations, allocation amounts – rather than programmes – are discussed. It is also instructive to note that the MDP focuses on capital projects that are mainly donor-funded, whereas the annual budget allocates recurrent expenditures funded by government revenues. Once consultations have been complete and the budget is presented to the National Assembly, it is read in an open meeting for feedback from the public. The budget itself is not one document but 16 separate papers representing the 16 ministries. Each document must feature a narrative justification of proposed programmes and requested funds under recurrent and capital expenditures.

Along with these 16 documents, the Ministry of Finance produces a financial note with the figures of the annual budget, the exchange rate and some monetary aggregates. The total budget of the country is also supposed to be contained in the Annual Plan produced by the NPO, which features the projects of the PSIP. However, it is unclear how this document relates to the development of the annual budget, and its sustained production seems to be impeded by the lack of a formal mechanism for collaboration between the NPO, Ministry of Planning and Development Cooperation and the Ministry of Finance. This gap has been acknowledged by these ministries, which maintain their intention to establish such mechanisms for collaboration. Collaboration with civil society is variable: civil society is consulted to some degree in MDP development, but not in the annual budget process.

Use of macroeconomic models

Suriname has tried since 1987 with the introduction of the World Bank Revised Minimum Standard Model (RMSM) to develop a suitable model for economic planning. The RMSM was aimed at making explicit the link between medium-term growth in poor countries and its financing. These models are projection tools built around the macroeconomic balances and detailed country debt data and are designed to project a country's external resource needs based on alternative GDP and export growth scenarios, together with the resulting debt servicing prospects.

They have, however, been found to be deficient for development planning and evaluation, since they may not be flexible in prices, the household sectors may be insufficiently disaggregated, and the design of this class development model possibly will not allow simulation of structural adjustment policies.

Moreover, such models ignore the gender dimensions of certain economic variables. For example, the incremental capital-output ratio on which this model centers as the measure of overall efficiency does not account for unpaid labour in the reproductive sector. The inclusion of unpaid labour would see a change in the value of this ratio, and therefore in the resulting policy recommendations.²⁵ The RMSM was rejected in the case of Suriname, based on dissatisfaction with assumptions made regarding public sector investment in subsidies to and available manpower for the productive sectors.

In 1991 the MACMIC model, based on the Dutch Macroabc methodology, was introduced. These models feature a macro block including the government sector, exchange rates, the balance of payments and other macro aggregates; and a micro block with the most important export production sectors. They suffer a similar lack of gender unawareness as that described above, in that they do not feature the household or reproductive sector as a productive economic factor, and do not consider the gendered distribution of income. Although economists were trained in its use, it was subsequently abandoned based on a lack of capability to work with the software.

In 1992 the Structural Adjustment Plan (SAP) was introduced and replaced the use of modeling. The SAP reforms included improved tax collection, a unified exchange rate, and the

²⁵ Cagatay, N. "Engendering Macroeconomics and Macroeconomic Policies" Working Paper No. 6 UNDP 1998

elimination of some government subsidies. Following the SAP period, an attempt was made to combine the use of modeling with the development of the MDP, by attempting to quantify target macroeconomic aggregates for use in the MDP. This was seen in the SURYA model; a model introduced in 1998 and based on the system of national accounts, comprising the private, government, external, and household sectors. This model featured the household primarily as a unit of consumption, and secondarily as a labour source, but did not take into account the economic inputs (time, labour) required in the reproductive sector for production of this labour.

Currently, on realization of the need to examine the links between economic and social development, the NPO is working on the development of a Social Accounting Matrix (SAM) approach to the structure of a Computable General Equilibrium (CGE)²⁶ model. The SAM is a matrix presentation of the social accounts of a country which differs from traditional national accounting in that it emphasizes the *distribution and redistribution of income* generated by the production process, rather than on analysis of the use of goods and services for final and intermediate consumption, export and accumulation. With its focus on disaggregation of these social inputs and outputs, SAM analysis is very conducive to the integration of gender as a category of analysis to be built into an adapted CGE model. Factors of production in a SAM may be distinguished by formal and informal parts, and factor earnings may be distinguished by gender²⁷. The NPO of Suriname is keen to explore these possibilities in the development of its own SAM, and is intent on identifying technical assistance in this area.

Civil society capacity and the National Women's Machinery

Suriname enjoys a thriving civil society movement whose work contributes significantly to the development of the country, and which possesses a great deal of expertise in issues related to health, poverty, gender and development, among other areas. Many of the NGOs working within the area of women's rights are subsumed under the umbrella organization 'Platform of NGOs for Women and Development' (PWD), and have developed programmes which include the areas of women's economic security and rights; training on gender and governance; sustainable development for gender equity; health; and economic opportunities for Maroon women and women of the interior.

The need to prioritize women's issues and to make women visible within development policy, particularly issues relating to rural and indigenous women, has been articulated by the women's movement. Gender is not incorporated, for example, in the Poverty Reduction Strategy Paper (as is the case for many other CARICOM countries which have developed such strategy papers). The Ministry of Planning and Development Cooperation has acknowledged that the issue of indigenous women requires particular attention. However, the movement also recognizes that the failure to prioritize gender among governments of the region is a reflection of a similar failure among the international community and donor organizations, and that until the latter emphasizes gender equity not only as a social concern but as an instrument in economic development, the problem of gender-blind macroeconomic planning will persist.

²⁶ CGE models are highly structural, generally neo-classical mathematical representations of the economy with multiple interacting agents and markets, which assume that households maximize utility subject to budget constraints, and that industries minimize costs subject to production functions (of capital and labour).

²⁷ Sinha, Anushree and N. Sangeeta. "Gender in a Macro Economic Framework: A CGE Model Analysis". Paper prepared for the Second Annual Meeting of the Gender Planning Network, Kathmandu 2002.

Another issue of concern to the NGOs is the expressed need for ongoing and systematic consultation between government and the NGO community.

The Ministry of Home Affairs is the government agency responsible for gender affairs in Suriname. The National Bureau of Gender Affairs now primarily executes the directives of the MoHA related to gender, and provides administrative support. However, the role of the NWM in policy coordination with respect to women's issues appears to be constrained by a lack of institutional capacity.

Suriname also attempted to implement the Commonwealth Secretariat Gender Management System (GMS) of gender mainstreaming, including the introduction of focal points within strategic government ministries. However several constraints have been identified with respect to the implementation of this system. These include a lack of adequate training²⁸ of gender focal points; the fact that responsibility for gender issues is merely an adjunct to their 'real positions'; and the fact that focal points do not occupy policy-making positions and therefore have little influence²⁹.

Statistics

The General Bureau of Statistics (GBS) considers as its most crucial problem the lack of response from businesses and government agencies in trying to acquire statistics, as well as a disclosure prevention policy which results in a lack of reporting on industries with a high contribution to national GDP. Like most countries of the subregion, it is currently concerned with acquiring the necessary data for reporting on the Millennium Development Goals (MDGs), and to this end has set up working groups according to inter-related indicators.

The Bureau attempts to collect as much data as possible disaggregated by sex, and makes use of the ECLAC gender indicators guide to ensure the gender-specificity of its statistics. It currently conducts the population census, but only a part of the production account is factored into national accounts owing to problems with the availability of data. The Bureau has produced a special publication on gender statistics within the social sectors, and has appointed a statistician with special responsibility for the collection of gender-disaggregated data. It also produces its household survey with a focus on patterns of expenditure rather than income.

The University of Suriname

The Faculty of Social Sciences at the Anton de Kom University offers up to post-graduate education in Economics, although their programmes tend to focus on business economics, and most graduates gravitate towards the business and finance sectors rather than to macroeconomic policy analysis. Even those working within the latter field within government have concentrated studies on business economics studies. The macroeconomics courses of the University are decidedly neo-classical in orientation and teaching and research staff in the

²⁸ ECLAC in 1998 facilitated training of gender focal points on gender mainstreaming, but there was no follow-up to this work because of the subsequent decline of the gender bureau. After a change in government, new gender focal points were appointed and were not trained.

²⁹ Perhaps the one exception to this is the work of gender focal points in the Ministry of Justice in an initiative to amend legislation regarding the Civil Service Act and the Penal Code.

Economics Department have not been exposed in any substantial way to the concepts of gender and macroeconomic policy. However, there is some independent research being conducted on women in the informal sector.

The University is also home to an Institute for Social Science Research and an Institute for Development Planning and Management, whose objective is to support the development policy of the Surinamese Government. There appears to be some level of collaboration between the Government of Suriname and Suriname, as faculty are often represented on government advisory committees. There exists within the Sociology Department a single course on gender and development, which makes use of the research of the University of the West Indies (UWI) Center for Gender and Development Studies (CGDS).

Capacity of EPU, civil society and supporting institutions to realize integration of gender into macro processes

EPU

Attitudes and awareness: The National Planning Office and the Ministry of Planning and Development Cooperation are particularly open to building capacity in gender analysis and planning not only in the development of their MDP and sectoral plans, but in the construction of the SAM. Top level officials and planners in the ministry are aware of the importance of using gender as a point of analysis, and are desirous of linking a future project on the preparation of policy planning handbooks with the ECLAC Special Project, in order to ensure a gender-sensitive approach. The Ministry of Planning and Development Cooperation is also keen on taking the MDGs as a point of departure in its move toward a more gender-sensitive planning process.

Theoretical knowledge and technical skill: Staff within the NPO and Ministry of Planning and Development Cooperation are highly skilled economists and social planners, but have received no specialized training in gender and macroeconomic policy. Even those with an appreciation for gender as an economic category consider it from a ‘women in development’ approach, and training for staffers should begin at the basic level of gender sensitization.

Civil society

Attitudes, theoretical knowledge and technical skill: CSOs in Suriname are highly organized, vocal, and possess great capacity to provide support to and monitor government in integrating gender into macro planning processes. Indeed the core body of knowledge to be found with respect to the interrelation of gender and macroeconomic policy is in the women’s movement. Any capacity building undertaken in Suriname should not exclude civil society, and should also encourage stronger links between government and non-governmental groups.

Supporting institutions

Attitudes, theoretical knowledge and technical skill: The Bureau of Gender Affairs at present possesses little capacity to provide support to the economic planning unit in this area. Other institutions, such as the Central Bank and the University of Suriname, have not exhibited high degrees of interest, but need to be encouraged to participate.

Recommendations

The current system of planning using the MDP, sectoral plans, macro modeling and consultations with civil society are highly compatible with the integration of gender, and provide important opportunities. However, training in this area should highlight the importance of linking macro planning with the budgeting exercise, and of developing workplans, targets and indicators which allow for effective monitoring by civil society. Given the interest of the NPO in developing a gender-aware SAM, ECLAC should support the organization of a separate workshop to address this issue.

Training (as at the time of the study)

- The Bureau of Gender Affairs took part in late 2003 in a one-week course on gender and development, which was thought to be needed but was insufficient to fill the capacity gaps present in the Bureau.
- The Budget Reform Project of the Dutch Government has been providing training in the development of sectoral plans.
- ECLAC in 1998 facilitated training of gender focal points on gender mainstreaming, but there was no follow-up to this work because of the subsequent decline of the gender bureau. After a change in government, new gender focal points were appointed, and were not trained.
- The Women's Parliament Forum (WPF) of Suriname held a UNIFEM-supported workshop in 2002 on "Gender-sensitive budgeting as an instrument for gender equality and combating poverty". This was attended by NGOs, several GMS gender focal points including those in the MoF and the Gender Bureau.

Future training

At the time of the study:

- The NPO was in the process of planning training for its economists in the Social Accounting Matrix framework and Computable General Equilibrium models.
- The Ministry of Planning and Development Cooperation was coordinating a mission to Washington DC to build technical capacity in the development of financing modalities for sectoral policy plans.

Recommendations for ECLAC capacity building

Primary target beneficiaries	Economists from Ministry of Finance, National Planning Office and Ministry of Planning and Development Cooperation; Ministry of Trade and Industry; Platform of NGOs
Secondary target beneficiaries	Line ministry planners; labour unions and private sector
Duration	
Partners in Design and Implementation	Platform of NGOs
Primary target macroeconomic process	Public expenditures as they relate to the MDP
Secondary target macroeconomic process	All other public expenditures of budget process; Social Accounting Matrix;
Content	Module I: Review of public expenditure management system (PEMS) of country; relation of budget process to MDP
	Module II: What is gender analysis and why does it matter?
	Module III (relate Modules I and II): Tools for integration of gender analysis into budgetary exercise side of MDP

TRINIDAD AND TOBAGO

Economic environment

The economy of Trinidad and Tobago is built on perhaps the most industrialized base in the subregion, dependent on reserves of petroleum and natural gas, iron and steel industries, and the production of methanol and nitrogenous fertilizers as well as petroleum products. The Government of Trinidad and Tobago is also orienting its diversification efforts toward tourism, manufacturing and agriculture. The real growth rate was up in 2003 to 4.1 per cent from 2.7 per cent in 2002, credited mainly with the start-up of additional liquefied natural gas operations, and signaling 10 years of economic growth.

The government's economic strategy is based on fiscal and monetary discipline, private sector investment, and export-led growth, manifested in reductions in subsidies to State enterprises and a comprehensive divestment programme. There was a marginal increase in the unemployment rate in 2003 (10.5 per cent up from 10.4 per cent in 2002), and inflation rose by 3.8 per cent. Central government accounts registered a surplus of 1.4 per cent of GDP, and the external debt service ratio fell from 4.4 per cent to 3.8 per cent.

Overview of gender in Trinidad and Tobago

A 2002 gender profile of women in Trinidad and Tobago³⁰ identifies relatively high levels of gender-based violence and limited economic power; underrepresentation in decision-making positions and predominance in the lowest paid and least protected occupations as among the gravest concerns of women in the country.

³⁰ CIDA Industrial Cooperation Programme 2002. "Gender Profile: Trinidad and Tobago".

A World Bank Working paper on consumption expenditure and female poverty provides evidence that the incidence of poverty in Trinidad and Tobago is higher among female-headed households (which make up about 31 per cent of all households) than among male-headed households.

Although the International Labour Convention No. 100, which calls for equal remuneration for men and women for work of equal value, was ratified by Trinidad and Tobago in 1997, women earn lower monthly wages than men at every occupational level and at practically every level of educational attainment. The female labour force participation rate for women in 2000 was 47 per cent, compared to 75.3 per cent for that of men. The female unemployment rate is 15.2 per cent while that of men is 10.2 per cent. (2004 figures).

The percentage of females with HIV has steadily increased since 1983, and HIV rates are reported to be five times higher in girls than in boys aged 15-19. Violence in Trinidad and Tobago has been identified as a serious health and economic problem. Criminal violence of which gender violence is an important component has been increasing in recent years and has demands of civil society on government.

Approaches to integrating gender into macroeconomic planning

Attempts at integrating gender into macroeconomic policy planning have been few. The Central Statistical Office (CSO) has collected time use data on household production, and a national gender policy has recently been formulated. These and other efforts are discussed below.

Institutional framework

Vision 20/20 and the Social and Economic Policy Framework

The Vision 20/20 Plan of Trinidad and Tobago is a long-term development framework aimed at achieving developed country status by the year 2020. Four different horizons are being used in this planning process. The long-term horizon involves the development of a 17-year framework which outlines the aims of the development agenda and the targets through which it is to be achieved. Within this long-term structure, the medium-term horizon includes specific objectives and strategies at the national and sub-national levels over the first six years of the planning period in two three-year time periods. For the shorter-term (2004-2006), detailed actions plans are to be developed. The fourth horizon of one year is to serve as the basis for the formulation of the annual budget. The annual budget is intended to be a rolling plan in the overall implementation of Vision 2020.

The preparatory phase of the plan saw the undertaking of a situational analysis of the country as against the MDGs, as well as against selected developed and developing countries in key areas³¹. Following this will be an analysis of the present and future needs of the population classified by age groups and sectors. The methodology for this analysis has so far involved the

³¹ These include Norway, Ireland, Singapore, States within the USA and emerging developing countries including Costa Rica.

setting up of a multi-sectoral group and sub-committees, to guide the eventual production of a Multi-Sectoral Development Plan (MSDP). The Plan is to feature a matrix of activities as well as a timetable of interventions and allocations. The multi-sectoral group and its sub-committees are to guide national consultations in focus areas.

While this process is in train, the Ministry of Planning and Development in collaboration with the Ministry of Finance currently formulates a social and economic policy framework (SEPF) based on achieving the targets which will be identified in the completed Vision 20/20 MSDP. The SEPF policy agenda is based on the election Manifesto of the ruling party, with input from sectoral ministers.

The national budget process

The budget process in Trinidad and Tobago starts approximately in May of each year with a budget call made to line ministries to submit proposals to the Ministry of Finance. Proposals are also invited from NGOs and interest groups, and these are all reviewed by an internal budget committee to determine whether they are compatible with the SEPF. Prioritization of proposal policies by the budget committee is made according to cost constraints and the SEPF, and is the subject of ongoing consultations with line ministries.

However, the annual budget still represents an incremental/line item system. It is instructive to note that even though the Government of Trinidad and Tobago affirms that the move from an MTEF approach to a SEPF approach represents an acknowledgement of the importance of formulating macroeconomic policies with social content, the structure of the SEPF still features something of a division between the social and economic sectors. In the SEPF, gender is listed as a category of social development, and is not considered in terms of economic development. The macroeconomic planning process lacks a formal mechanism for gender analysis, and there is no apparent relationship between the Vision 20/20 plan and its satellite initiatives, and the budget process.

The role and influence of donor organizations

The CDB is currently funding a tourism project involving the rehabilitation and upgrading of community facilities and related infrastructure in Trinidad and Tobago. It also plans to fund an education sector project for the establishment of a multi-campus college to upgrade and strengthen integration of post-secondary education and training.

The IDB in 2003 approved a loan to develop a plan for comprehensive public sector reform. Among the goals of the programme are the identification of the structural rigidities that hinder public sector effectiveness, economy and transparency and the development of viable strategies to correct these rigidities. The strategic plan is to feature an applied series of measures to improve the structure of government spending and optimize the public sector's size, management structure, organization, functioning, human resources, legal framework, accountability and delivery mechanisms. Other projects in the IDB portfolio include an agricultural sector reform programme, a community development fund and a health sector reform initiative.

There is also a European Development Fund (EDF) unit within the Ministry of Planning and Development which coordinates the programming, preparation and implementation of projects funded by grant resources provided by the European Commission. Eighty per cent of the programmable resources available to Trinidad and Tobago under the current EDF programme will be allocated to the education sector, and 20 per cent to health, specifically HIV/AIDS. A rural electrification programme and poverty reduction initiative supported by the Fund are also ongoing.

Although there is some concern about the extent to which projects are donor-driven, rather than initiated in response to evidence-based planning, there seems to be a significant level of donor coordination by the Ministry of Planning and Development. However, while the Women in Development Unit of the IDB is responsible for the gender content of programmes, there appears to be no systematic effort to integrate gender into donor-funded programmes.

Civil society and the National Women's Machinery

Apart from the formulation of the National Gender Policy, the Division of Gender Affairs, the national women's machinery in Trinidad and Tobago, conducts a Women in Harmony Programme targeting poor, single female heads of household for its skills training programme. It also runs a male support programme, a project teaching non-traditional skills to women, and a gender equity institute which promotes leadership building and aids in institutional capacity-building.

The NWM has been involved in much gender sensitization and gender analysis training with police, the military and nurses; and has undertaken a gender analysis training pilot project within the Ministry of Labour. It also engages in continuous training of its own project officers, sourcing consultants for this purpose from the UWI, the ECLAC and other United Nations agencies. Future plans of the Bureau include a study of the effect of the Free Trade Area of the Americas (FTAA) regulations on women micro entrepreneurs, as well as training in gender budget analysis.

A previously established inter-ministerial committee with gender focal points in key ministries is no longer functioning, and apart from the formulation of the new Gender Policy, the role of the Bureau appears more to be one of organization of micro activities, than of policy coordination across government.

Among the civil society groups active in Trinidad and Tobago are the Caribbean Association for Feminist Research and Action (CAFRA), Women Working for Social Progress (WWSP) and the Network of NGOs, which is decidedly gender-focused. CAFRA, as a member of the International Gender and Trade Network (IGTN), has been leading the research in the region on the effect of emerging trade regimes on gender equality. The Network of NGOs has been highly visible in agitating for women's rights, and is now coordinating a Gender Justice Campaign protesting the handing down of inadequate sentences for violent crimes against women. The Network is also actively promoting the implementation of gender budget analysis of the national budget, and in 2002 hosted a UNIFEM-sponsored three-day workshop on gender budget analysis.

Statistics

Trinidad and Tobago in 1996 enacted the Counting Unremunerated Work Act, which calls for the Central Statistical Office (CSO) to collect data on unwaged work. A one-time sample time-use survey was conducted in which tasks carried out in household production – e.g. preparation of meals – were valued at market rate, and then an estimation made of the value which men and women contribute to this kind of production. The data were included as a satellite account in the 2000 census, and used in the country's gender policy, but have not been used in economic planning. Lack of capacity has been identified as the major constraint to conducting more frequent time use surveys.

The CSO attempts to collect most of its social statistics disaggregated by sex, as is true of the data collected by the Social Indicators Millennium Development Goals Committee. The practice of producing gender bulletins with selected data disaggregated by sex was discontinued almost 10 years ago and has not since been reinstated. The Office has had no training in gender, and believes that in order for such training to be effective, it should be institutionalized within the Office.

The CSO is also now collecting data to be used in its first attempt at constructing a Supply and Use Table (SUT), which it is expected will be completed by the first quarter of 2005. SUT is a core table in the System of National Accounts. It presents for the total economy, by product group, the resources and uses of goods and services. The flow of goods and services is therefore traced from their producers to their users. For each product, total supply should balance with total use (in purchasers' price). The basic equation is:

$$\text{Output} + \text{Imports (total supply)} = \text{Intermediate Consumption} + \text{Exports} + \text{Gross Domestic Fixed Capital Formation} + \text{Final consumption} + \text{Changes in inventories (total use)}$$

The SUT therefore provides a framework for checking on the consistency of statistics on the flows of goods and services, obtained from the various sources. This methodology may also be extended to external non-monetary satellite accounts for, e.g., household production. Such development of a data system in which the different parts (social and monetary) are built on comparable concepts - and can thus be closely linked – provides a favourable environment for gender/social analysis or gender/social impact assessment on which economic policy may be formulated.

The data currently collected by the CSO, as well as the pioneering steps taken in valuing unwaged work, provide a good foundation for research that would facilitate the integration of gender into economic planning.

The University of the West Indies, St. Augustine

The Department of Economics of UWI, St. Augustine Campus, offers up to doctoral certification in Economics, which is mainly neo-classical in orientation, with no gender focus in any of its courses. However, the Department engages in ongoing consultation with the UWI-CGDS, whose faculty has provided guest lectures in gender and macroeconomics. The Sir Arthur Lewis Institute of Social and Economic Research is also represented on the campus, and is a part of the Faculty of Social Sciences. While the main focus of the work of the Institute is research,

other functions include technical assistance to regional governments in the field of economic and social policy, and the evaluation of projects undertaken by local, regional and international agencies. However, there is no formal mechanism for consultation with government. At St Augustine, the Institute's main focus of research has been on voting behaviour, the sociology of enterprise, privatisation, and race relations. The Institute is also embarking upon research into the informal market, attempting to measure sectors not traditionally measured by government agencies. It is also beginning work on developing a SAM for Trinidad and Tobago.

This Campus, like the other two in the region, is also home to the CGDS, which promotes teaching, research and outreach activities in gender-related issues by offering undergraduate and graduate level interdisciplinary courses in gender and development across faculties within UWI; undertaking collaborative research projects and engaging in outreach activities that include seminars, workshops and networking events.

The Center believes that of the areas in which it has worked to demonstrate the importance of gender as a point of analysis in Trinidad and Tobago, it has made the least progress with economic policy. As part of the Vision 20/20 preparatory research, the Center has worked along with the Division of Gender Affairs to produce a Draft National Gender Policy, a draft Gender Committee Report offering a situational analysis of gender in the country, and recommending priority actions. The Policy comprises six sectoral studies including labour and the economy; health and medicine; education; law and the judicial sector ; agriculture and natural resources; and social and community development, including poverty. The process began with national consultations in eight communities in Trinidad and Tobago, interest groups and government policy-makers. The Policy is to guide the work of government and the Gender Affairs Division in mainstreaming gender.

In its attempts to see gender integrated as a cross-cutting issue in economic development planning, the CGDS plans to recommend that scholarships to the Center be offered for government workers and it also plans to design an MSc Programme which serves the practical purposes of professionals involved in policy design. Although there is currently one multi-disciplinary course being taught in gender and development at the University, the Center is working towards:

- The establishment of one Feminist Economics course taught in the Department of Economics;
- Gender analysis infused into other courses;
- More gender-related research being undertaken; and
- A greater number of economics students taking a minor in gender studies

Capacity of EPU, civil society and supporting institutions to realize integration of gender into macro processes

EPU

Attitudes and awareness: the Ministry of Planning and Development acknowledges the significance of gender-sensitive planning and has indicated that gender analysis is incorporated in the planning process. This was seen for example in the existence of a sub-committee on gender for the purpose of the Vision 20/20 Plan, which is charged with the articulation of

strategic objectives to advance gender equality in the country. The Ministry of Planning and Development acknowledges that gender is not considered in programme evaluation, and that there is no standard process for ensuring gender sensitivity, but programmes which ‘lend themselves to gender analysis’ are designed from a gender perspective. Political will for building on these processes needs to be built.

Theoretical knowledge and technical skill: The approach to gender integration within the Ministry of Planning and Development seems to be largely a programme one: i.e. there is some attempt to consider the potential gendered impacts of sectoral policies, but not of fiscal policy. There appears to remain the perception that gender is a ‘social issue’.

Civil society and the NWM

Attitudes and awareness: Civil society has led the call for the application of gender analysis to government budgets, and though in need of strengthening, is well placed to further advocate for gender budget analysis, and to partner with government for its realization through consultations on policy design and provision of technical assistance. The NWM is also anxious for the undertaking of a gender budget initiative.

Theoretical knowledge and technical skill: The experience of the Division of Gender Affairs and of CSOs in providing training in gender analysis, and their own exposure to concepts of gender-aware economics have created an important base of knowledge. However, they lack specific knowledge of what is involved in the budget process itself, and of specific tools for the integration of gender.

Supporting institutions

Attitudes and awareness: Within the Ministry of Finance are high-level planners who, although having been newly introduced to the concepts of gender-aware economics, are amenable to the exploration of strategies for gender-aware budget formulation. In equally influential positions, however, are those who are of the view that gender equality is a ‘social issue’, and that enough has been done in the past to address the issue, resulting in a reverse imbalance (i.e. men and boys are now at a disadvantage particularly in terms of education). Any efforts to integrate gender will have to be institutionalized at this level, rather than allowed to be dependent upon individual preferences.

On the other hand, the relationship between the UWI Department of Economics and the CGDS, and their own history of engaging in consultations with government, provides an important opportunity.

Theoretical knowledge and technical skill: The concept of gender in macroeconomic planning is extremely new to the Ministry of Finance, and there is no technical knowledge in this regard. The CGDS represents a body of knowledge on which government may draw for technical support in its efforts to integrate gender in macro planning.

Recommendations

The training of government officials in the economic planning unit of Trinidad and Tobago is a necessary condition (though not the only condition) to bring about the integration of gender into the budget process. While the EPU may be amenable to undergoing such training as it relates to Vision 20/20, and while such training is of course desirable, the ECLAC Special Project should be particular about relating its training to macroeconomic processes which impact budget allocations, rather than those which may have little or no relationship with the budget process itself. To this end the Ministry of Finance should be a primary target beneficiary.

Training to date

- CGDS in 2001 co-hosted a one-day seminar on gender and economics with ECLAC.
- The Network of NGOs in 2003 hosted a three-day UNIFEM-sponsored gender budget workshop which was attended by NGOs as well as government agencies.

Future training

UNIFEM is intent on working with the CGDS at St. Augustine to develop a regional comprehensive summer training course on gender and macroeconomic policy, geared towards economists. This constitutes an important step towards gender aware macroeconomic planning.

Recommendations for ECLAC Capacity Building

Primary target beneficiaries	Economists from Ministry of Finance, Ministry of Planning and Development; Network of NGOs
Secondary target beneficiaries	Line ministry planners; labour unions and private sector
Duration	
Partners in Design and Implementation	UNIFEM Caribbean; CGDS UWI
Primary target macroeconomic process	Allocation of public expenditures as part of the budget process
Secondary target macroeconomic process	Development of structural economic policies; Multi-sectoral development plan (MSDP)
Content	Module I: Review of public expenditure management system (PEMS) of country; relation of budget process to other aspects of policy development (esp. V. 20/20 and MSDP)
	Module II: What is gender analysis and why does it matter?
	Module III (relate Modules I and II): Tools for integration of gender analysis into PEMS (and MSDP)

ST. VINCENT AND THE GRENADINES

Economic environment

The economy of St. Vincent and the Grenadines³² is fuelled by agriculture and tourism. The developments in the World Trade Organization (WTO) and trade liberalization have severely reduced income from the banana industry which was regarded as the mainstay of the economy. In 1989, export earnings from bananas amounted to EC\$89.9 million. The uncertainty of the market and adverse weather conditions over the last 10 or so years have resulted in a very significant decline in export earnings from bananas. In 2000 earnings were EC\$49.49 million. In fact, the agricultural sector recorded a decline of 7.2 per cent in 2001 and its share of GDP fell to 11.2 per cent from 12.5 per cent in 2000. Although there has been a decline in the contribution of agriculture to GDP in recent years, it is still the most important productive sector in terms of its contribution to employment and the government attempts to alleviate poverty, particularly in the rural areas³³. Poverty in St. Vincent and the Grenadines is estimated at 33 per cent.

In its efforts at expanding the emerging financial sector, the Government of St. Vincent and the Grenadines “aims to promote the development of money and capital markets, reform the interest rate regime, reform the prudential regulations and supervisory systems for financial intermediaries, ensure the recapitalization and restructuring of weak financial institutions, institute measures to strengthen competition among banks and initiate legislative reform of the financial laws and regulations.”³⁴ Further attempts at diversification include a Tourism Strategic Development Plan approved in 2002, whose main focus is to improve the level of competitiveness and flexibility of the tourism sector and to minimize the effects of external and internal shocks.

Overview of gender in St. Vincent and the Grenadines

Although women in St. Vincent and the Grenadines have been increasing their participation in the educational system and have displayed higher success rates than men, men still retain an advantage in participation at the tertiary level. Formal labour market participation rates are lower for women than for men, although there has been a narrowing of the gap over the past decade³⁵. There is also severe feminization of poverty, particularly in the rural areas, and in one of the poorest areas identified under the poverty assessment study, female headship was 95.8 per cent.

Approaches to integrating gender into macroeconomic planning

At the recently held tenth meeting of the Council for Human and Social Development (COHSOD), the decision was taken to use education as a point of entry for gender mainstreaming, a directive which has been adopted by the St. Vincent and the Grenadines, though it is not yet clear what this strategy will involve.

³² Population 115, 900 (2000 est.)

³³ Cecil Williams, “Public Sector Reform: Challenges and Opportunities St. Vincent and the Grenadines”. Commonwealth Advanced Seminar New Zealand, 2003.

³⁴ 2003 Budget Address delivered by Prime Minister and Minister of Finance, Dr. Ralph Gonzalves.

³⁵ Male labour force participation rates fell from 86.2 per cent (1981) to 76 per cent (2001), while female participation rates increased from 41 per cent to 45.8 per cent over the same period of time.

The Eastern Caribbean Economic Management Programme (ECEMP) has partnered with the Ministry of Finance in a gender mainstreaming initiative in which the ECEMP has assessed government spending in key ministries (education, health, agriculture and social development), and has established a database with initial findings. The programme has also carried out a data needs assessment, and has conducted gender analysis training with officials from the ministries in which the analysis was done. The next step, in August 2004, is to be a series of breakfast training sessions with Cabinet in gender and macroeconomic planning. This training exercise is being supported by the NWM.

However, resource interviews within the Ministry of Finance and Planning reveal the sentiment that although the ECEMP project has found its way into that ministry, it is being confined to a social planning framework, and not integrated into the macroeconomic side. Nonetheless, this project represents an important initiative with which ECLAC might align itself, as it has already gained acceptance by the Ministry of Finance and Planning.

Institutional framework

The Government of St. Vincent and the Grenadines has established a number of bodies with responsibility for the economy:

- The National Economic and Social Development Council (NESDEC) a broad-based institution of civil society and public officials;
- The Tripartite Committee on the Economy (TCE) which consists of representatives of the government, labour and business and which focuses on wages and salaries, prices, employment, investment and productivity;
- The Cabinet Committee on the Economy (CCE) which meets once per month to review government finances, the macro-economy, the PSIP that provides directions to ensure improved performances.

The NESDEC has created an intersectoral Poverty Reduction Task Force for the purpose of implementing the 2001 Poverty Reduction Strategy Paper. This is overseen by the Ministry of Finance and Planning, but is not formally consulted during the budget process.

The economic planning unit: the Ministry of Finance and Planning

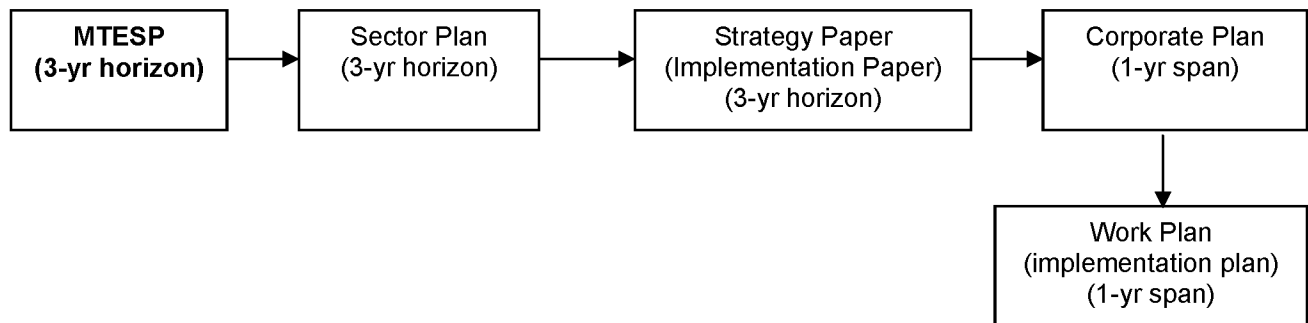
The Ministries of Planning and of Finance are combined into one government ministry in name, but have clearly demarcated duties: the Ministry of Finance deals primarily with the recurrent side of the budget, while the Ministry of Planning is responsible for capital projects. These two exercises are undertaken separately.

The Ministry of Planning prepares a Medium-Term Economic Strategy Paper (MTESP) containing the economic targets and strategies for a three-year period. This is used in preparing the Budget Circular to be sent to line ministries, but is not used in determining resource allocations within the Ministry of Finance. Although the Ministry of Finance and Planning is

attempting to introduce programme budgeting, there is still a zero-based budgeting system³⁶ in place, and no correlation so far between the MTESP and resource allocations made. The present lack of a programme budgeting system has been attributed to a lack of training to accompany such a system. Capacity building was seen as integral to the introduction of such a system.

However, zero-based budgeting still provides an opportunity by which programmes and policies may be justified according to their potential to contribute to economic development and well-being through the promotion of gender equality.

Lack of human capacity was identified as a key constraint to implementation connected to the planning process. Government planning among officials in the Ministry of Finance Department and in planning units in major ministries is supposed to be driven by several documents, following a supply of information which resembles the following:



Nevertheless, implementation was also constrained by a lack of detailed plans. In addition there was not a strong link between the above process and the actual allocation of resources. There is also no systematic coordination of donor programmes.

The national budget process

The Ministry of Finance prepares a three-year rolling budget. The budget preparation process in St. Vincent and the Grenadines is initiated in the Ministry of Finance with the preparation of the Strategic Outlook for the next year. This document forecasts GDP growth and inflation rate in order to estimate government revenue over the forecast period. This information, along with the policy agenda as represented in the MTESP, is compiled into a Budget Circular and disseminated to government ministries and departments.

Line ministries then submit corporate plans, which are three-year strategic plans including a Strengths Weakness Opportunities Threats (SWOT) analysis of the agency, a summary of critical issues, and the programmes and projects that will be undertaken to respond to these issues. After a meeting of the Ministry of Finance with each sectoral ministry to discuss these plans, a first draft of the estimates is prepared and submitted to the Cabinet for review and debate. A second draft is then sent to the House of Assembly to be tabled before the Finance Committee³⁷ for approval, then submitted to the House for the estimates debate and approval.

³⁶ A method of budgeting in which all expenditures must be justified each new period, as opposed to simply explaining the amounts requested in excess of the previous period's funding.

³⁷ The Finance Committee is a sub-committee of Parliament which may amend the draft estimates.

The 2004 Budget Circular included 10 policy objectives by which line ministries should be guided in developing their corporate plans. Among these were:

- Fiscal stabilization and consolidation: to increase government savings through tax reform, debt management and expenditure restraint;
- A focus on pro-poor policies in access to factors of production land, capital and entrepreneurial skills;
- Improvement in the delivery of public services;
- Measures to increase employment and eradicate poverty.

It also included the following macroeconomic and fiscal targets which line Ministries should bear in mind developing programmes:

- Current revenue to GDP
- Current expenditure to GDP
- Capital expenditure to GDP
- Total expenditure to GDP
- Debt service to current revenue
- Wages and salaries to current expenditure
- Recurrent surplus to GDP

In the identification of the above fiscal targets and policy objectives, there is no analysis done of the gender implications of such policies, and no directive to line ministries to use gender as a point of analysis in defining programmes. Such analysis then is left to individual ministries, and in fact to individual policy makers who may have a particular level of gender awareness.

However, a laudable approach of the government to the budget process is an increasingly participatory methodology. The budget proposal itself is open to community consultation before it is passed in the House, and in attendance at these meetings is the Prime Minister and planning board.

Civil society and the national women's machinery

The national women's machinery in St. Vincent and the Grenadines, the Gender Affairs Division, is situated within the Ministry of Social Development, Family, Gender Affairs, and Ecclesiastical Affairs. Like most gender bureaus in the region, the NWM reports a low level of power to influence economic issues and impact financial decisions. It finds itself seen more as a welfare department than a policy coordination unit, and is often responsible for programmes for which line ministries should be responsible e.g. the reintegration of teenage mothers into the education system, which in the estimation of the Bureau should be an initiative of the Ministry of Education. This tends to erode the limited resources allocated to the NWM for the promotion of gender equality.

Following a recently completed ECLAC situational analysis of women in St. Vincent and the Grenadines, the Division plans to draft a National Gender Policy, and is also currently engaged in a gender sensitization programme at the community level. Community consultations

are also coordinated by the Bureau, but are not used in the formulation of policy. The Division also sits on several intersectoral committees and Task Forces, including committees on trade, health and poverty alleviation, but much of its time and energy had to be spent defending the importance of its own existence, rather than on policy analysis.

Generally, government officials lacked the training and capacity to undertake adequate policy analysis and, as such, the government frequently contracted consultants for the formulation of research reports. A similar lack of capacity is found in the Division, where staff has not been adequately trained in gender policy analysis.

Gender focal points have been organized into a Committee which provides a link between the ministry and the Gender Affairs Division. However, focal points are generally not in decision-making positions, and the Committee is not effective in ensuring the formulation of gender-aware policy.

The civil society movement in St. Vincent and the Grenadines contributes significantly to the provision of social services ordinarily undertaken by government. The Windward Islands Farmers Association (WINFA), an NGO which promotes the interests of farmers in securing sustainable livelihoods, is currently drafting a proposal for gender budget training of farmers in rural communities for the purposes of monitoring government policies. It has also commissioned a study examining the impact of trade policy on vegetable farmers.

Statistics³⁸

The Central Statistical Department of the Ministry of Finance and Planning carries out a population census every 10 years, in which the data collected are disaggregated by sex. Sex-disaggregated data are also found in the 2003 Digest of Statistics and the 1996 Poverty Assessment Report. There are also additional sources of data collected by the ministries of labour, agriculture and health; and other State and private enterprises. The ECEMP has carried out a comprehensive data needs assessment of gender-disaggregated data sources in the country, on which the ECLAC Special Project may build.

Capacity of EPU, civil society and supporting institutions to realize integration of gender into macro processes

EPU

Attitudes and awareness: The ECEMP project has begun to raise the level of awareness regarding gender and macroeconomics within the Ministry of Finance and Planning. However, the project seems to be concentrated within the social sectors, and even in the Ministry of Finance, participation in the project does not extend across the Ministry. Ministry of Finance officials, though interested in learning more about gender-aware planning, are somewhat apprehensive about the extent to which the ECEMP and similar projects will be institutionalized.

³⁸ ECEMP Data Needs Assessment and Progress Report

Theoretical knowledge and technical skill: There is a lack of theoretical knowledge regarding gender-sensitive macroeconomic planning. There also appears to be a need to build capacity in general concepts of planning.

Civil society and the NWM

Attitudes and awareness: Civil society organizations and the Gender Affairs Division are keenly aware of the importance of the integration of gender into macroeconomic planning. CSOs enjoy reasonable access to some aspects of decision-making, and although needing to be strengthened institutionally, are well-placed to offer support to government in gender-aware planning. The NWM, however, is seen as a welfare department and does not have the respect of other agencies as a policy coordinating department. It would need greater contact with the budget process and Ministry of Finance officials to have any impact on gender mainstreaming in economic policy formulation.

Theoretical knowledge and technical skill: The NWM possesses a reasonable level of expertise in issues of gender and development, but would require specific training in gender and macroeconomic policy. Among CSOs, CAFRA and WINFA are highly knowledgeable in this area, but do not possess the personnel required to provide support to government.

These NGOs have underscored the need for alternate measures of poverty in the region, to capture effects on groups not secured by traditional measures. They have also observed that the priorities of government are influenced by the gender blindness found among international donors, and have highlighted several examples of this gender blindness:

- i. Failure to recognize contribution of volunteer work to national production: there is a trend towards increasing taxes which must be paid on behalf of local and international *volunteers*.
- ii. Investment bias of government toward infrastructure rather than human capital

Recommendations

It is recommended that the ECLAC Special Project partner with ECEMP in its gender budget initiative for the design of training, to avoid duplication of activities.

Training to date

- 2004 ECEMP training of government officers in four line ministries in gender-sensitive policy design
- 2004 ECEMP training of Gender Affairs Division officers in basic data collection techniques

Future training

ECEMP/NWM training of Cabinet in the importance of gender-aware planning

Recommendations for ECLAC Capacity Building

Primary beneficiaries	target	Economists <i>and Ministers</i> from Ministry of Finance and Planning; Ministry of Agriculture; NWM; CSOs
Secondary beneficiaries	target	Line ministry planners;
Duration		
Partners in Design and Implementation		ECEMP; WINFA
Primary macroeconomic process	target	Public expenditures
Secondary macroeconomic process	target	Policy document formulation: MTESP, budget circular, strategic plan
Content		Module I: Review of public expenditure management system (PEMS) of country; relation of budget process to MTESP and other policy documents
		Module II: What is gender analysis and why does it matter?
		Module III (relate Modules I and II): Tools for integration of gender analysis into public expenditure allocations

CONCLUSION TO THE STUDY AND GENERAL RECOMMENDATIONS

Although regional economic planning units are responsible for macroeconomic policy development, an assessment of their capacity to integrate gender must take into account available resources in other areas of government and outside government; and mechanisms for access to such resources. This report has found that *generally*, with the exception of Suriname (and to a much lesser extent Trinidad and Tobago with its Center for Gender and Development Studies), both planning units and organizations which might potentially provide support lack the technical capacity to mainstream gender into macro planning. EPU's require training in basic concepts of the social construction of gender, household bargaining and the differential management of resources, and the interaction of gender and the economy. This should form the basis for further country-specific training in gender budget analysis.

It is the general recommendation of this report that as far as possible, training be based on country contexts, and take place in-country. This provides a live, accessible model on which participants may draw during the training exercises, and grounds the theories being presented in the institutional and economic realities of each country. It also allows participants to appreciate the relevance and role of their respective positions in bringing about any structural changes that are necessary to the functioning of their organizations, and to the overall goal of creating an economy which operates to the equal benefit of all actors. It would furthermore allow for increased and more broad-based participation across government agencies and civil society.

Where the above recommendation is not practicable, a regional workshop should be designed around the different basic public expenditure management systems represented in the

region. Generalized training based solely on theoretical principles is of marginal value, and will not go far in changing the gender-blindness of current systems of budget formulation.

Although not strictly within the scope of this study, the interaction of macroeconomic planning and the budget process with trade policies cannot be emphasized enough. There seems to be a regional trend in government administrations of separating the business of international trade negotiations from the business of everyday macroeconomic planning and financial management, which results in planning being undertaken without consideration of all the factors which impact economic and social well-being.

Resource interviewees expressed concerns regarding trade policies which take power away from government and place it in the hands of the private sector, which does not seek to be gender-aware in its activities. The broad reorientation of government resources toward the 'productive' sectors in the light of trade policies demonstrates a lack of recognition of the productive nature of reproductive work, and compromises economic growth and well-being. These issues should be borne in mind in the design of ECLAC's regional training programme in gender and macroeconomics.

Another area requiring attention is the fact that many donor organizations with portfolios in the region, including regional organizations, do not prioritize gender as a criterion in the approval and *implementation* of projects. This constrains the level of gender-awareness of country programmes in a context of ever-decreasing official development assistance.

Despite these limitations, the outlook is favourable to begin the integration of gender into macroeconomic policies in the region. Each of the countries under study has to date had some exposure to the principles of gender and macroeconomic analysis, and there exists a reasonable level of political will towards initiatives which promote the use of gender as a point of economic analysis.

As a crucial step in overcoming difficulties in capacity and institutional structure, it is important that the ECLAC initiative encourage member countries to reaffirm their commitment not only to this specific exercise, but to activities of institutional strengthening and reform (see Appendix 1) which would support this exercise. This commitment must come from the highest levels of government office not in response to an abstract goal of gender equality, but as a result of active, substantive participation in initiatives such as the present one. Commitments should be made to concrete activities, and responsible personnel named for continued contact with ECLAC in this regard.

Also as a general recommendation, countries should be encouraged (especially for the purposes of participation in this initiative) to pull all economic planning exercises into a transparent and unified activity whose center is the national budget. The ECLAC capacity building exercise should focus as a matter of initial priority on public expenditures within the national budget, with emphasis being placed on the integration of the technical exercise of financial planning and other processes such as multi-annual development plans and macroeconomic modeling.

It is also instructive to support the continued visibility of the importance of gender analysis in both economic planning units and line ministries, through regular internal training

exercises that include the participation of NGOs. Although this study emphasizes the value of the monitoring role of civil society in sustaining the demand of initiatives which seek to integrate gender into macroeconomic policy, what must not be overlooked is the ultimate responsibility of governments. In order to build consensus among government planners and economists, initiatives such as this must underscore the value of gender aware-planning to economic growth, and to economic and human well-being.

Annex 1

Recommendations for institutional strengthening and reform which would support the integration of gender into macroeconomic policy

COUNTRY	MACROECONOMIC PROCESSES	GOVERNMENT STRUCTURES	SUPPORTING INSTITUTIONS AND ORGANIZATIONS
BELIZE	Implementation of a clearly defined macroeconomic planning process	Increased participation of MND in budget process	Strengthening of CSOs and NWM
	Consultation with line ministries in budget process	Improved access of the NWM to economic decision-making	
	Replacement of incremental budgeting with evidence-based or programme budgeting		
SURINAME	Establishment of connection between NPO macroeconomic planning and social planning involved in sectoral policy papers		Improved consultation between NGOs and government
			Strengthening of NWM
TRINIDAD AND TOBAGO	Improved rationalization of the Vision 20/20 Plan and SEPF with the budget process.	Improved communication between the Ministry of Planning and Development and the Ministry of Finance in developing the annual budget.	Encouragement of sustained consultation between the CGDS and government.
		Increased collaboration among the NWM; Ministry of Planning and Development and Ministry of Finance	

Annex 1 (Cont'd)

COUNTRY	MACROECONOMIC PROCESSES	GOVERNMENT STRUCTURES	SUPPORTING INSTITUTIONS AND ORGANIZATIONS
ST. VINCENT AND THE GRENADINES	Rationalization of the MTESP with the budget process	Improved communication between the Ministry of Planning and the Ministry of Finance in developing the annual budget.	Greater involvement of NGOs at <i>implementation</i> level.
	Improved donor coordination	Improved access of the NWM to economic decision-making	

Annex II

Terms of reference for consultancy³⁹

The overall objective of this Project is to catalyse and strengthen the understanding of gender differentials in the formulation and implementation of macroeconomic policies, so as to improve gender equity outcomes in the Caribbean. The immediate objectives are to: determine the knowledge gaps in economic planning units which potentially proscribe gender-aware policy development; and, close any such gaps by building the capacity of national and regional economic planners in gender analysis and planning.

Project activities will involve a needs assessment of economic/planning units in four Caribbean countries – Belize, Suriname, Trinidad and Tobago and St. Vincent and the Grenadines – as well as subregional training workshops for economic planners in gender-aware approaches to policy development. This project, with its emphasis on the generation of knowledge of the differential impact of macroeconomics on women and men, will be a catalyst to the formulation of gender-sensitive evidenced-based economic policy. The project, through the participation of a number of regional institutions, such as CDB and UWI, will also allow for the deepening of the capacity of economists in the region to render assistance to governments and civil society in the gender analysis of macroeconomic processes and outcomes.

Purpose of the Consultancy

A consultant is being sought by ECLAC to carry out the needs assessment study - whose purpose is to provide a basis for the development of a training agenda - and to subsequently share the findings at an Ad Hoc Expert Group Meeting.

Duties of the consultant

- Undertake research missions to the four selected countries: Belize, Suriname, St. Vincent and the Grenadines and Trinidad and Tobago.
- Carry out an analysis of the capacity of economic and planning units and institutes in each country to integrate gender into their planning processes (needs assessment study).
- Document and analyse the data collected, and prepare a report of not less than 40 pages for submission to the ECLAC office including the following:
 - Background to the issue.
 - Analysis of data and conclusions arrived at.
 - Lessons learned.
 - Recommendations.
- Present report at an Ad Hoc Expert Group Meeting.

Outputs

A needs assessment study of not less than 40 pages.
Presentation of findings at, and active participation in, Expert Group Meeting.

³⁹ Background provided in Introduction to the report, Page 3.

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