



United Nations Entity for Gender Equality
and the Empowerment of Women

**INFLUENCING THE FISCAL POLICY AND PUBLIC BUDGETS IN
BOLIVIA: THE LONG WAY TRAVELLED BY WOMEN
ORGANIZATIONS IN THE EXERCISE OF THEIR RIGHT TO
PARTICIPATION AND SOCIAL CONTROL**

Case Study on Gender Responsive Budgeting.

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INFLUENCING THE FISCAL POLICY AND PUBLIC BUDGETS IN BOLIVIA: THE LONG WAY TRAVELLED BY WOMEN ORGANIZATIONS IN THE EXERCISE OF THEIR RIGHT TO PARTICIPATION AND SOCIAL CONTROL¹.

“The importance of working in Gender Responsible Budgets is based on the implications that budgets have in women lives. It is something so fundamental that has to be socialized in other countries and villages...Motivate them not to falter. It seems impossible but it can be. We have to read the circumstances and advance together”.

(María Álvarez, Former Director of Gender from the Municipality of Cochabamba)²

1. Background³

The experience of articulation and influence of Bolivian women organizations in the public budget has its origins in 2002, when the UN Entity for Gender Equality and the Empowerment of Women (UN WOMEN)⁴, carried out by means of a consultant team⁵, the first analysis from the gender perspective in the national budget and the municipal budgetary process, including as an example, the budget of La Paz.

The country already counted at that time with a regulatory framework favorable to the topic of gender equality with the approval of laws elaborated by mandate of the Plan of Action of the World Women Conference of Beijing in 1995. The gender instance of the State⁶ had elaborated the First Plan for Equal Opportunities promoting the incorporation of gender equality as a public policy. In addition, it achieved with the approval of the Law against Intrafamilial and Domestic Violence, the delegation to the municipalities of the country of the responsibility of attention in the cases of intrafamilial and domestic violence through Integral Municipal Legal Services (“*Servicios Legales Integrales Municipales*”) (SLIMs).

On the other hand, it was incorporated in the Law of Municipalities of 1999 an article to define as municipal competence the incorporation of gender equality in the design, definition and execution of municipal policies, plans, programs and projects. With this specification, the municipalities had in their Programmatic structure, a Program of *Promotion and Gender Policies* and a program of *Defense and protection of women and childhood*. However, the assignation of resources to these programs was not compulsory, so the municipalities omitted them.

¹ Case study about Gender Responsible Budgets elaborated by Raquel Coello Cremades. Consultant of the Regional Office for the Americas and the Caribbean, UN Women.

² Testimony extracted from the video: http://www.presupuestoygenero.net/index.php?option=com_content&view=article&id=597:video-sobre-los-presupuestos-sensibles-al-genero-en-bolivia&catid=184:videos&Itemid=400054

³ Extracted and adapted from Zabalaga (2012).

⁴ In that moment, the UN Development Fund for Women (UNIFEM). In 2000 this institution started to work in the topic of gender responsible budgets worldwide. In Latin America the work was initiated in 2001 in the Andean Region (Bolivia, Ecuador, Peru), expanding later to other countries such as Argentina, Brazil, Colombia, Honduras, Uruguay and Venezuela, and it was articulated using a Regional Program articulated between 2005 and 2012, coordinated from the Office of Quito-Ecuador.

⁵ The team was formed by Martha Gutiérrez, economist with experience in public management and Carmen Zabalaga, specialist in gender, with experience in the municipal field. Both had been trained in a capacity building course in Gender Responsible Budgets (PSG) organized by UNIFEM in Quito, Ecuador, in 2001.

⁶ The Deputy Secretary of Gender was created in Bolivia in 1993, thanks to the influence political women and organizations made since 1989.

In the same way, women organizations, institutions and movements worked at national level, influencing and elaborating the monitoring of the incorporation of gender in the laws and public policies. In the municipal level, some no governmental institutions and women organizations of the peri-urban area and rural municipalities, worked in the framework of the Law of Popular Participation⁷, attending demands from women and influencing to incorporate them in the Development Plans (PDM) and in the Annual Operative Programs (POA) of the municipality. The experience gathered by women was very important, but until 2002 we did not know or develop actions to influence directly in the public budgets.

The biggest challenge in the development of the investigation about the analysis from the gender perspective of the national budget and the municipal budgetary process was to know the operation of public budgets and to look for the conciliation between the budgetary technical criteria and gender criteria that had to be used for the analysis. Among other results, the analysis evidence how the National General Budget, as it was being formulated, appeared as an instrument of limited effectiveness to contribute to the gender equality objectives in the development and within it. This is because in the usual form of making the budget all people are homogenized and it is assumed that public budgets are beneficiated in a more or less equitable manner to all the citizenship, ignoring the different roles, responsibilities and capacities of women and men. In addition, the analysis identified that only 0.4% of the public investment programs were focused towards gender-equitable objectives.

With the analysis and the presentation of the results in this first exercise the work of the Gender Responsible Budgets (PSG) were initiated in Bolivia.

2.-Description of the experience

2.1 Goals and key actors of the Process

After the fulfillment of the investigation, the Institute of Integral Feminine Training (*"Instituto de Formación Femenina Integral"*) (IFFI)⁸ of Cochabamba decided to start working on the topic of the PSG in the municipal field. This institution counted since 1996 with a rich experience in the municipality of Cochabamba, in the development of strategies to build demands from women, to incorporate them to the Development Plans and to do the monitoring, but they bumped into a "bottleneck": the majority of the demands did not come to have budgetary assignments to be executed.

So, in 2003, the IFFI started an initiative with the objective of knowing the municipal public Budget, analyzing who the resources benefited and in which way they help or not to the fulfillment of women rights and how they improved the conditions for gender equality, or how we

⁷ The Law of Popular Participations, form part of the second generation measures after the adjustment measures. It was approved in April 1994 and compulsory since 1996, it modifies substantially the work of the State al local level; it transfers the municipalities new competences towards human development, economic resources for a better attention to investment and it defines, as a fundamental aspect, the citizenship participation of women and men in the processes of planning and control of the municipal management.

⁸ The IFFI is a non-profit institution created in 1981 in the city of Cochabamba that works in the municipal reinforcement and influence with women organizations at urban level.

achieve the access to accountability about public money. To do so, the IFFI made in alliance with neighborhood and women organizations of the Municipality of Cochabamba, an analysis of the destiny of the district budget, requiring the authorities to give count of the expenses in health, education and security. This first investigation opened the way to the knowledge of the municipal budgetary processes and the governmental institutional mechanism in relation to the distribution of public resources at local level.

One of the learning of this first moment was the need to influence in the national framework, since many of the decisions that affected the way in which the municipal public budgets were elaborated, were taken from the central government. For this reason, in 2005 with the support of the Regional Program of Gender Responsible Budgets of the UN WOMEN, the IFFI started a new experience looking for the reinforcement of the municipal work but expanding the work of influence at national level. The objective of this project was: *Giving impulse to actions of political + influence and social control to achieve modifications in the focus and regulation of the municipal public expenses towards investments to promote social and gender equality, incorporating legal dispositions in the national regulation, and actions of social interpellation, proposal and control to assure the implementation of actions of municipal expense orientated to gender and social equality, in the framework of sustainable human development, based on alliances among different women organizations and social actors.*

To start the influence strategy it was necessary to expand the initial alliances to women organizations that acted at national level and located in La Paz, where the central government was located. At that time, women networks and institutions of this city worked individually in certain topics, without a space to permit coordination. For this reason, in July 2005, by initiative of the IFFI and with the support of UN WOMEN, the “National Bureau of Work in Gender Responsible Budgets” (*“Mesa Nacional de trabajo en Presupuestos Sensibles a Género”*) (MNT-PSG)⁹ was created, with the objective of articulate the different networks and institutions of the civil society, the state and the international cooperation, which wanted to work on this field.

2.2 Main strategies

➤ Influence in the regulation

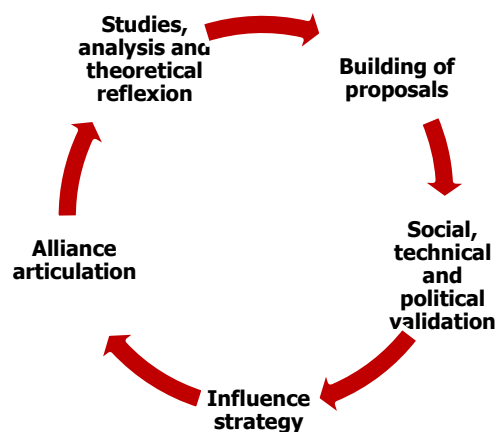
Following the path and the background that originated the experienced, the IFFI and the organizations of the MNT-PSG established as objective the achievement of the enforceability of the assignation of resources for gender equality thought regulations. For this, the established strategy included the following phases¹⁰:

1. Elaboration of a legal proposal, that implied working on its technical consistency.

⁹ At the beginning, the MNT-PSG was formed by: the IFFI, the AMUPEI Network, the National Association of Bolivian Counselors (*Asociación Nacional de Concejalas de Bolivia*) (ACOBOL), the Network of Women NGOs- Women Coordinator, the Network of Women Transforming the Economy (*la Red de Mujeres Transformando la Economía*) (REMTE), the Collective called *“Colectivo Cabildeo”*, the Political Forum of Women, the Ombudsman, the Deputy Ministry of Women, the two Gender Commissions of the National Congress (one for deputies and other for senators), the UN WOMEN, the project *“Proyecto DDPC”* from USAID. Then, other institutions were added, such as: The women center *“Centro de la Mujer Gregoria Apaza”*, the GTZ, the women platform *“Plataforma de Mujeres de La Paz”*, the foundation *“Fundación La Paz”*, the CIPCA and the foundation *“Fundación Pachamama”*, the international DNI, the CLADEM Bolivia and the institution *“Institución Desarrollo de la Alianza Noruega”*, among other.

¹⁰ Zabalaga (2011)

2. **Socialization, validation and complementation with the women organizations in the country**, which gave it social consistency (legitimation obtained through consensus and validation). That means that the important was that the proposal were not launched only at the level of a single group but also that it counted with the support of an extensive social sector, and women organizations and representatives.
3. **Broadcast and negotiation of the proposal of political influence**, which implied the broadcast of the proposal among the authorities and generate alliances and supports at political level, that means, searching the political consistency.
4. **Control and inspection**, where, to approve the **proposal**, it was necessary to establish processes of social control and inspection in the municipalities, to fulfill the mandate approved at national level.



In consequence, the first works in the MNT-PSG, were developed around the elaboration of the regulatory proposal that obliged the municipal governments to assign resources for gender equality.

As a first step, the “*Colectivo Cabildeo*”, by delegation of the MNT-PSG, carried out a study of “**Sources of Municipal Investment and Possibilities for Municipal Investment in Gender Equality**” (“*Fuentes de Inversión Municipal y posibilidades para Inversión Municipal en Equidad de Género*”) to analyze the sources of resources with which municipal investment was financed and which had been its behavior in the last five years. In words of one of the actors of the process “*The objective was that our proposal becomes unanswerable, so they could not tell us that we can (elaborate the regulation) but that there were not enough money (to assign the resources)*”¹¹.

The study showed enormous economic dependence that had the great part of the municipalities¹², due to its very lower internal tax and the closed regulation that regulates them. It also confirmed the need to elaborate a proposal that permitted to make economically sustainable the mandate established for the Municipalities to invest in Gender Equality.

At the same time, several meetings were organized with the proper organizations of the Bureau¹³ and between these and diverse authorities¹⁴ to discuss both the form and the content of the legal text. Initially, we worked in a proposal of specific regulation to promote the assignation of

¹¹ Interview to Carmen Zabalaga.

¹² More than 67% of the 327 municipalities existent in 2005, mostly small and rural, depended exclusively frm the income of the General Treasure of the Nation.

¹³ At that moment: the Ombudsman, the ACOBOL, the DDPC3, the “Colectivo Cabildeo”, the Articulation of Women for Equality (*Articulación de Mujeres por la Equidad y la Igualdad*) (AMUPEI), the IFFI and the UNIFEM.

¹⁴ Minister of Finance (Waldo Gutiérrez), Minister of Popular Participation (Naya Ponce), Deputy Minister of Presidency (Guillermo González), the Deputy Minister of Budget (Oscar Montaña), the Director of Municipal Budgets and Funds (Richard Paz), the Responsible of Budgets of the Ministry of Finances (Gonzalo Calisaya) and the Deputy Minister of Women (Teresa Canaviri).

resources for gender equality at municipal level. Eventually, and by proposal of the Ministry of Finance itself, they decided to incorporate an article in the *Guidelines for the Elaboration of the Planning and Budget of the municipalities of the Country* (“*Directrices de Elaboración de la Planificación y Presupuesto de los municipios del País*”).

Eventually, in October 2005, the **Guidelines for the elaboration of municipal plans and budgets 2006**, incorporating for the first time an **article** (initially article 21) **that obliges to assign resources to promote gender equality at municipal level.**

During the whole year, the MNT-PSG made a work to improve and qualify the edition of this article that became “article 22” since the guidelines of 2007, being edited as follows:

Article 22- Assignment of Resources for Gender Equality: *In compliance of the municipal competences established in the Law num. 2028 of Municipalities and Suprem Decreet num. 24864, of 10th October 1997, of Equality of Rights between Men and Women, they must assign the needed resources to promote and develop:*

- *The Integral Program for Economic-Productive Development and Women Employment;*
- *The Program of Public Services of Attention of Family Needs.*
- *The Program of Broadcast of Rights Equality and Responsibilities between Women and Men at Home, the Community and the Municipality; and*
- *The Program of Reinforcement of Social and Political Leadership of Women and their Organizations*

They must also program resources for the working of the integral legal services, assigning to one of the functional areas of its structure, the responsibility to assume the correspondent activities.

Other key action that form part of the influence in the regulatory framework is given, since 2009 after the approval of the new political Constitution of the State, in the framework of the **discussion of the Framework Law of Autonomies and Decentralization (LMAD)**, where the general guidelines of the autonomic departmental and municipal regimes were being built.

By assignment of the other women organizations that integrated the MNT-PSG, the “*Colectivo Cabildo*” elaborated a proposal of gender equality for the Economic, Tax and Financial Regime of the Law and for the chapters referred to the departmental and municipal planning, that is presented to the institutions integrated in the Bureau and the Parliamentary Agenda and negotiated with technicians and consultants of the Ministry of the Autonomies.

Eventually, the text of the Law approved in July 2010, authorized the departmental autonomous governments to finance up to a five per cent (5%) in non-recurrent programs to support gender equality and equal opportunities.

At the same time, and to influence at national level, the organizations of the MNT-PSG in coordination to the allied deputies elaborated in 2007 a proposal of Draft of the “**Law of Public Investment in Social and Gender Equality**” (“*Ley de Inversión Pública en equidad social y de género*”). The objective was to assure, through regulations, a compulsory percentage of investment in gender equality (in operation and investment) in all the public instances and all levels (national, departmental and municipal).

The proposal was presented and analyzed at national level with technicians of the Ministries and Parliamentary Commissions implicated¹⁵. Eventually, thanks to the managements made by the Alliance of Women for Equality (*Alianza de Mujeres por la Equidad e Igualdad*) (AMUPEI) as part of the MNT-PSG, the Draft was incorporated in the Regulatory Agenda of Women¹⁶ y and the Discussion Agenda of two Parliamentary Commissions that must adopt its approval: the Commission of Human Rights and the Commission of Economy and Finances¹⁷.

*“As part of the collective and coordinated work of the National Bureau, the present Draft of Law has been elaborated, as a legal instrument to establish a compulsory percentage of the sources of public investment, to look for a better redistribution of public resources under the principles of equality and justice, to allow the elimination of gender gaps in the socio-economic and cultural context of our country”
(Background of the Draft of Law. 25th of July 2008)*

➤ ***Construction of the collective knowledge. Towards a definition of the meaning of “investing in gender equality”: The categories and indicators of investment in gender equality of Bolivia.***

Since the incorporation of the article 22 women organizations faced a big challenge, because since that moment it was their responsibility to enable the formulation and proposal to the municipalities of the demands and projects to advance towards the transformation of the lives of women and the diminution of gender inequality. For this, the IFFI and the *“Colectivo Cabildeo”*, with the support of the UN WOMEN, organized in December 2005 in Cochabamba, a **National Meeting of Women Movements (*Encuentro Nacional de Movimientos de Mujeres*)**¹⁸ with the objective of socializing the article of the guidelines, to build capacities in PSG and to start to build a common understanding of what it should be understood as “investment in gender equality”.

In the event, a **methodology of building and validation of differentiated demands** were developed (see box 1), which worked from the premise that the investment in gender is a matter of development and not just a matter of women. A proposal of a “stock market of projects” was also elaborated, with examples of actions that permit the advance in equal opportunities and in the fulfillment of rights as a fundamental element to reinforce democracy and sustainable and equal human development.

¹⁵ For this reason, 4 technical working sessions were made, with representatives from: the Ministry of Finances, Planning and Coordination; Investment and Public Financing; the Deputy Ministry of Gender and the Deputy Ministry of Decentralization; members of the Commissions of Human Rights and social policy of the Chamber of Deputies, members of the Union of Parliamentary Women – UMPABOL and the participation of deputies and advisers from the Commissions of Finances, Economic and Social Development, Social Policy and Gender Commissions of both Chambers.

¹⁶ In 2011, thanks to the strategic Alliance between the Deputy Ministry of Equal Opportunities, the Platform of Women from the Assembly, the Legislative Agenda from Women and the National Alliance of Women for the Revolution and Unity, made a consensus to form a **Legislative Agenda of Women** to build and approve Laws with gender perspective.

¹⁷ Even if the Law has not been approved, their proposals are being taken in to consideration basis for the discussion of the future Law of Investment of the country.

¹⁸ In the meeting 122 women of organizations from the nine departments, members of the Units of Gender and Counselors from several municipalities of the country participate, as well as technicians and directives of the ACOBOL, Senators of Oruro and Chuquisaca, the Federation of Farmer Women BARTOLINA SISA, women from the mines FEMCOMIN, the Assembly of the Guarani People, and leaders from the Grass Roots Territorial Organizations (*Organizaciones Territoriales de Base*) (OTBs) of the urban area, the Work Central of the Alto (*Central Obrera del Alto*), the Confederation of Farmer Women of the Tropic of Cochabamba (*Confederación de Mujeres Campesinas del Trópico de Cochabamba*) (COCAMPROP) and the National Counsel of Ayllus and Markas of the Qullasuyu (CONAMAQ), apart from the organizing institutions: the *“Colectivo Cabildeo”*, the IFFI and UN WOMEN.

BOX 1: CONDITIONS AND PHASES TO BUILD DEMANDS FROM WOMEN

¿Which are the characteristics of the municipal projects with gender equality budgets?

- ◆ The respond to the **differentiated needs** of women and men, to promote equal opportunities and the fulfillment of rights, so they derived from the recognition of the existence of **inequalities, discrimination and social and gender exclusion**.
- ◆ Reinforce **democracy and sustainable and equitable human development** of the municipalities.
- ◆ It is not necessarily directed to women, but they do **take into account the impact and the differenced benefit** that they have on the women and men of the municipality.

¿Which factors contribute to elaborate the projects and budgets for gender equality?

- That the counselors, gender instances and staff of the SLIMs are informed or aware in gender equality and recognize it as a fundamental factor to achieve local development.
- The existence of a strategic vision of development with equality in the municipal management, a rigorous application of the regulation of planning and budget and an efficient budgetary execution.
- That the counselors and women movement identify and establish clearly the projects that will effectively diminish social inequality and make monitoring and social control actions.

Steps to incorporate municipal projects with gender responsible equality

1. We recognize specific problems that do not allow the exercise of women rights and the municipal development (through diagnosis and surveys) and we analyze the causes. The causes of these problems are, in some cases, in the social discrimination expressed in the policies and public investments, and in other cases, in the cultural patterns of gender discrimination and patriarchal prejudices.
2. We propose a Project to improve equality and its reach. Based on the analysis of the causes, we establish the type of solution that we believe to be the best to advance towards equality, taking into account the legal attributions and we define indicators to show that this solution will improve the lives of women.
3. We analyze the Type of Project we propose, to whom it is directed and how it benefits and generate equal opportunities.
4. We identify the competences the Municipal Government have to solve those problems of its population and the source to which the investment expenditure came.
5. We incorporate the Project in the municipal planning and budget.
6. We look for social support and alliances with sectors of the population that benefit from the proposal and/or support it.
7. We make social control and inspection of the execution, the monitoring and the evaluation.

SOURCE: Carmen Zabalaga and Tania Sánchez (2005). *Cartilla "Capacitación en PSG y Construcción de Demandas de Género"*. IFFI – UNIFEM.

The result of this socialization and joint building of proposals elaborated through the “stock market of projects” is the development of a “typology” that was denominated “**categories of investment in gender equality**”¹⁹. Afterwards, in 2006 y 2007, the IFFI and the “*Colectivo Cabildeo*”, allied with the MNT–PSG, reinforced and complemented the elaboration of these categories with the formulation of a proposal of “**Gender Indicators in the Annual Operative Programation (POA) and the Budget**” (“*Indicadores de Género en la Programación Operativa Anual (POA) y el Presupuesto*”)²⁰ to measure management quality and to evaluate the execution of the promotion of gender equality in the municipalities.

During this whole period, the categories evolved and were determined, being constituted in the conceptual basis of work that Bolivian women developed to influence in public budgets and also for the monitoring of their execution.

¹⁹ In the definition we opted to use the term of “**Investment**” categories in Gender as the form to vindicate and express that all public resource directed to improve women lives and gender equality is a public investment and not “expenditure”. See Zabalaga (2012).

²⁰ Document elaborated by Silvia Fernández and Marta Lanza.

The categories are conformed in the conceptual reference for the State. In 2009, the **fiscal regime of the LMAD** before mentioned, established the enforceability of the inclusion of categories and indicators of investment in gender equality in the System of National Planning and Budgeting, and it determined that the elaboration of departmental public plans and budgets will be done using those categories. The Deputy Ministry of Equal Opportunities (VIO), also elaborated the *Guide for the monitoring and Systematization of Gender Information in the Municipal and Prefectural Budgets (Guía para el recojo y Sistematización de Información de Género en Presupuestos Municipales y Prefecturales)*²¹ where information to apply the categories and indicators in all the local governments of the country were included.

Today, the categories have also emerged as a reference in Latin America and have started to be used in countries such as Argentina or Honduras to work in the promotion of the PSGs, both from the State as from the civil society.

The actual proposal of categories is shown in Box 2²².

**BOX 2: CATEGORIES FOR THE ANALYSIS AND ORIENTATION OF PUBLIC INVESTMENT
IN GENDER EQUALITY IN BOLIVIA**

Category-investment focused on women (FM) Name public investment in programs/projects and/or services exclusively directed to women in the different phases of the cycle of life, oriented to close inequality breaches between men and women and to promote the autonomy and the exercise of women rights. This investment is constituted by measures of positive or compensatory action or special promotion.

Category-investment in the social and public co-responsibility for the care and sustainability of life (CSV) Name public investment that promotes the co-responsibility of the State, society, community and all the members of the family, in the work of social reproduction, the care and sustainability of life, generating material and cultural conditions for a better distribution of domestic work and care task among all them. This investment must continue to diminish the burden of domestic work and unpaid work made at home, mostly made by women and to leave free part of their time to expand their opportunities in the exercise of human rights and the access to good living.

Category-investment in equality culture (CI) Name public investment that promotes structural changes in the patriarchal system, public management and the power relations between men and women. It contains actions directed to generate changes in the institutionalization and public management (regulations, policies, planning and structure) and the way of thinking and acting of the society and its institutions to reach social, ethnical and gender equality, the modification of the social and cultural imageries and the power relationships between men and women, as intragenic and intergenerational.

Category-redistribution for social and gender equality (RISG) Name public investment directed to the redistribution of public resources to improve life conditions, the exercise of human rights and the access to good living of the population with low income, that contribute indirectly to improve the conditions of women lives and to expand their opportunities for the exercise of their rights.

Source: Zabalaga (2012): *Sistematización de la Experiencia Categorías para el Análisis y la Orientación de la Inversión Pública en Igualdad de Género en Bolivia*. UN WOMEN.

²¹ Elaborated by Tania Sanchez for the Ministry of Justice-Deputy Minsitry of Equal Opportunities. Available at: http://www.presupuestoygenero.net/index.php?option=com_sobipro&pid=318&sid=453:Guia-para-el-recojo-y-sistematizacion-de-informacion-de-genero-en-presupuestos-municipales-y-prefecturales&Itemid=200020

²² The actual formulation was discussed and agreed in a workshop organized by the UN WOMEN and the MNT+PSG in February 2012.

➤ ***Pedagogy of the social influence and control to the achievement of the PSGs: Women are empowered and lead the processes.***

After the achievement of the regulation that obliged to invest in gender equality and a conceptual proposal about what that meant, some of the organizations such as part of the MNT-PSG as the IFFI, the “*Colectivo Cabildeo*”, the Woman House and, afterwards, the Woman Coordinator, developed with the support of the UN WOMEN and the Volunteer Program of the United Nations, a work to make effective the fulfillment of the article 22 of the guidelines in 26 municipalities²³ of 6 departments of the country.

In this process local teams are conformed in which both social organizations²⁴ as gender instances, the leaders and councilors of these municipalities participated. A series of training tools and practical application for the analysis of the Annual Operative Programs (POAs), the construction of demand and the influence for their incorporation on them; as the requirement and accountability of their future execution²⁵ and they carried out training workshops and national meetings to exchange experiences.

On the other hand, taking into account the investment categories and indicators in gender equality, the IFFI developed as part of the component of public budgets of the Observatory of Gender Equality (*Observatorio de Equidad de Género*)²⁶ a methodology of “investment ranking” through which the amounts destined by each of the 47 municipalities of the Department of Cochabamba are quantified to each of these categories, ranking them in descending order (See Box 3). The information was published in reports that were used by women organizations as a monitoring tool and politic pressure to increase policies and budgets orientated towards gender equality and women rights.

²³ Cercado of Cochabamba, Quillacollo, Vacas, Mizque, La Paz, Achacachi, Batallas, Tiwanaku, Sorata, Patacamaya, Coripata, Teoponte, Ayata, Eucalipto, Turco, Cercado de Oruro, Cercado de Tarija, Padcaya, Ravelo, Ocuri, Vitichi, Puna, Gonzalo Moreno, Puerto Rico, Porongo and San Javier.

²⁴ Women and neighborhood organizations, local groups, from the aylls, and centrals for farmer women originated from the Women Federation “Bartolina Sisa”.

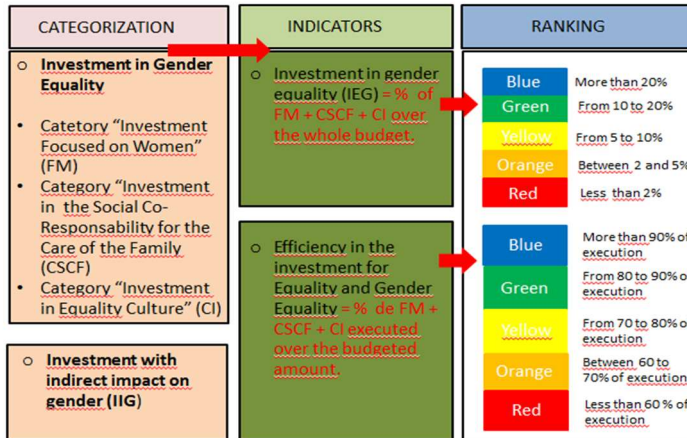
²⁵ Among the most important we can remark:

- [Zabalaga \(2008\): Guía de Capacitación “Participación Ciudadana en la Planificación, Presupuesto y Control Social, para el Desarrollo Municipal con Equidad de Género”. IFFI.](#)
- [Zabalaga et al \(2008\): Herramientas para incorporar PSGs en la gestión pública. UNIFEM – UNV - AECI – IFFI and MNT-PSG.](#)
- [Colectivo Cabildeo \(2011\): Avanzando hacia el vivir bien en nuestros municipios. Guía Metodológica para incorporar la igualdad de género en programas anuales de operaciones y presupuestos municipales](#)
- [Colectivo Cabildeo \(2012\): Curso de Capacitación sobre “Despatriarcalización, Descolonización, Políticas y Presupuestos Sensibles al Género \(PSG\)”](#)

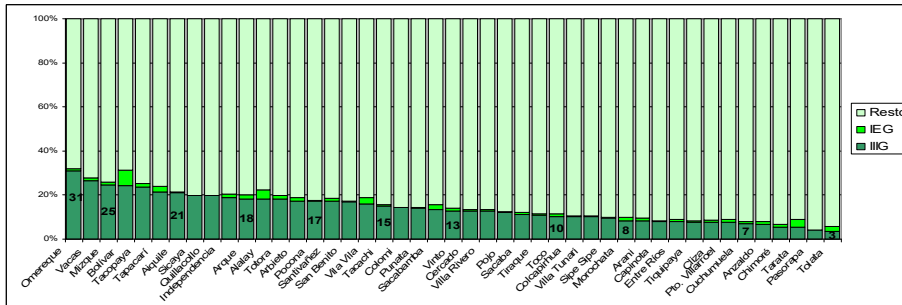
All available at the webpage of the IFFI, *Colectivo Cabildeo* and at www.presupuestoygenero.net

²⁶ The Gender Equality Observatory appears in Cochabamba supported by the IFFI as an instrument of information, reflexion and citizenship vigilance, which gives support to processes of analysis and evaluation in the matter of equality and gender equality in a context of cultural diversity. It is used as a mechanism of monitoring and social vigilance to give the women organizations and other actors of the civil society key and updated information to influence in the municipal, departmental and national institutionalization, to improve and consolidate gender policies that correspond the needs and demands of women. The observatory has three components: public budgets, violence and communication. For further information, visit <http://www.iffi.org.bo/Observatorio/>.

BOX 3: METHODOLOGY OF INVESTMENT RANKING IN GENDER EQUALITY DEVELOPED BY THE GENDER EQUALITY OBSERVATORY OF THE IFFI

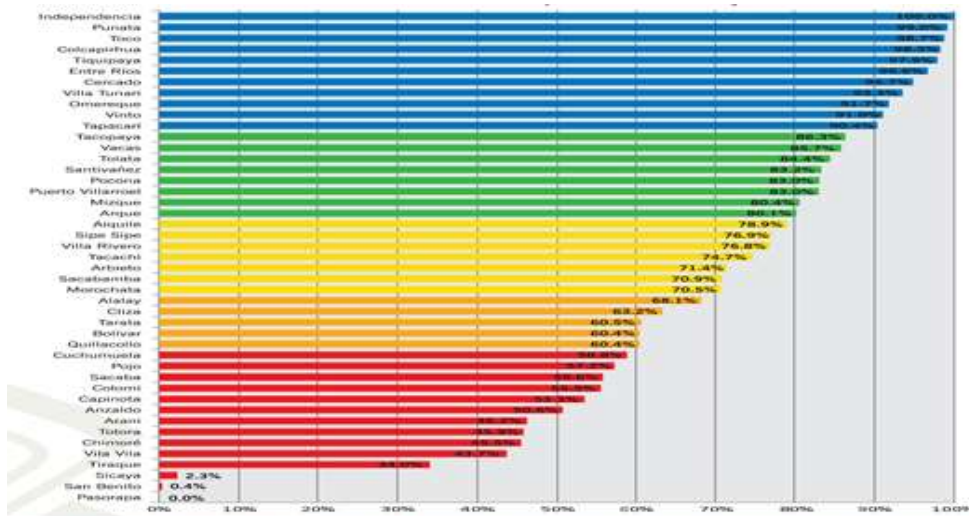


RANKING ACCORDING TO THE INDICATOR OF "INVESTMENT IN GENDER EQUALITY" (IEG)



RANKING ACCORDING TO THE INDICATOR OF "INVESTMENT EFFICIENCY" (EIEG)

Graphic 5. Efficiency in the Investment in Gender Equality and Thermometer.



SOURCE: IFFI VI Report from the Gender Equality Observatory. Bolivia

➤ **Questioning the fiscal policy framework of the country**

Higher budgetary assignments for gender equality can be achieved. But the true transformation also implies the modification of the form in which the fiscal policy itself is designed. For this reason, the Bolivian women organizations that work promoting the PSGs also decided to examine their work to influence in such policy.

The first field in which the work is being done is in the **process of national planning and budget** itself. In this sense, the *Colectivo Cabildeo* with the support of the UN WOMEN carried out a technical assistance to the Ministry of Planning to elaborate a methodology that permit gender mainstreaming in the process of elaboration of the Sectorial Plan within an Integral System of Planning of the Plurinational State (SPIEP)²⁷. With this same Ministry a **proposal of recognition of house and care work, abandon of the patriarchal society in the economic model and PSG** was elaborated to be included in the Plan of Economic and Social Development 2011-2015.

At the same time, the MNT-PSG, by means of the *Colectivo Cabildeo* and the public workers of the Deputy Ministry of Equal Opportunities of the Ministry of Justice, started a work with public workers of the Deputy Ministry of Budgets of the Ministry of Economy and Public Finances to incorporate an accounting category within the **budgetary classification based on purpose and function, to permit the identification of the resources destined to gender equality** based on the investment categories²⁸.

This category is incorporated in the budgetary classifications of 2011 under the denomination “10. Classification based on purpose and function of gender equality, and social equality and protection” (“10. Clasificación por finalidad y función de igualdad de género, equidad y protección social”). After its approval, the organizations of the MNT-PSG made a broadcast campaign in the radio and printed media and the VIO sent notes to all the municipal authorities of the country to remind them their obligation of considering this classification.

Other of the fields of fiscal policy which was object of influence was the **Law of Pensions** which is formulated and discussed during 2010. For this reason, proposals of regulations are elaborated in which the recognition of house work of women and their contribution to society is proposed, establishing favorable measures to women in the provision stipulated in the retirement pension.

Other of the strategies to influence in the formulation of the fiscal policy and to achieve the funding of national priorities in the field of gender equality is the creation of **accountability exercises** of equality policies.

Using and adapting the tools developed by the Millennium Project for the accountability of the Millennium Development Goals (ODMs), UN WOMEN allied with the VIO and the MNT-PSG carried out in the first moment the accountability of the Economic, Productive and Labor Axes of the National Plan of Equal Opportunities (PNIO) and worked in the incorporation of the

²⁷ The methodology is published in: Silvia Fernandez (2009): *Guía de Transversalización de género en los PSDs*. Deputy Ministry of Equal Opportunities of the Ministry of Justice.

²⁸ This work appeared, in part, thanks to the experience exchanges supported by the Regional Program of PSG of the UN WOMEN, where the work developed in budgetary classifications was known by the Ministry of Finances of Ecuador.

accounted proposals in the budget of the Ministry of Productive Development and Plural Economy. After, the work was expanded to the health and education axes of the PNIO itself.

With the accountability results actions of influence were developed in the **Financial Law** (Law through which the general State budget is approved yearly), through dialogue meetings with the Commission of Planning, Economy and Finances of the Plurinational Legislative Assembly, conforming an Interinstitutional Committee with the participation of this Commission, the VIO and the MNT-PSG.

In 2013, after the approval of the **Integral Law against Gender Violence**, the *Colectivo Cabildeo* allied with the VIO and the State Service of Autonomies (SEA), retook the learning generated in the accountability exercises adapting the methodology and the tool to measure the amount required to implement that Law²⁹.

➤ ***Incorporating the knowledge generated in the PSG in the academic and institutional training.***

After the conceptual and methodological advances developed in the Bolivian experience, other of the important efforts have been the development of alliances to achieve that this knowledge to be part of the specialized training given at postgraduate academic centers.

An important moment in this sense was the agreement signed by the *Colectivo Cabildeo* and the IFFI with the National Center of Training (CENCAP) of the National Bureau, to elaborate a Folder of PSG that would be a requirement for the training of municipal technicians at national level.

As a complement, the Postgrade Centre of Development Sciences (CIDES) of the “Universidad Mayor de San Andrés” and the *Colectivo Cabildeo* with the support of the UN WOMEN, carried out at the end of 2009, the Course on Women Economy, Fiscal Policy and Gender Responsible Budgets, so responding to the demands of training of human resources specialized to promote and consolidate the institutionalization of the gender perspective in the economy and to advance in the influence in public policies and budgets. In 2012 this course became an online Undergraduate, increasing the possibilities of reaching students throughout the country and the region.

²⁹ Thanks to the work of influence of women organizations and the MNT-PSG the Integral Law against Gender Violence approved in March 2013, incorporates the enforceability of the State to assign resources for its fulfillment.

2.3 Main results

The main results obtained at this time in the Bolivian experience can be summed up in the following:

- ✓ In the **regulatory field**:
 - Since 2006, the incorporation of an **article for the investment in gender equality, in the Specific Guidelines for the elaboration of Annual Operative Plans (POA) and Budgets in all the municipalities of the country**, which are issued yearly by the Ministry of Economy and Public Finances. By means of this article (Art. 22), the municipalities have the obligation of assign a budgetary amount to projects to promote gender equality. This mandate has achieved the maintenance in all the budgetary annual regulations until today.
 - In July 2010 they achieved the incorporation within the **fiscal regime of the Framework Law of Autonomies and Decentralization** of the enforceability for the System of National Planning and Budget to include investment categories and indicators in gender equality, as the elaboration of public plans and budgets using those categories. It is also included the enforceability to establish a gender equality regime in the Organic Laws and the Autonomic Statutes. The Law also authorized the departmental autonomous governments, as an addition to their competences established in the Political Constitution of the State, to finance up to a five per cent (5%) in non-recurrent programs to support gender equality and equal opportunities, among others.
 - The **Law of Pensions** approved on the 10th of December 2010, incorporates the principle of Gender Equality and uses a non-sexist language in the whole text. It also includes the recognition of women house work and their contribution to society, establishing favorable measures to women in the provisions established in the retirement pension.
 - The **Integral Law against Women Violence**, approved in 2013, obliges the 4 bodies of the Bolivian State to assign resources for its execution. By means of a technical commission in which the Ministers' cabinets and the women organizations they work in the accountability of its implementation.
 - Additionally, we count with a proposal of **draft of the Law of "Public Investment for Social and Gender Equality"** incorporated in the Parliamentary Agenda of Women and a proposal of chapter of Planning and Budgeting eventually incorporated in the draft of the Framework Law of Equality.
- ✓ Related to the **process of Planning and Budgeting**,
 - In 2008 it was achieved that the Ministry of Development Planning incorporated **the gender mainstreaming as a component of the methodology in the elaboration of Sectorial Plan** of Development of the Integral System of Planning of the Plurinational State (SPIEP).
 - The proposal of the new Plan of Economic and Social Development 2011-2015 approved in the Minister's cabinet in December 2010 incorporated a **proposal of recognition of house and care work, abandon of the patriarchal society in the economic model and PSG**.
 - In 2011 **the incorporation in the Catalogue of the Budgetary Classification based on Purpose and Function**, Purpose 10: *"Gender equality, equality and social protection"* and Function 10.9: *"Gender Equality and other services to eliminate inequalities and social*

protection". This category permit to make visible all the lines in the budget and resources assigned for gender equality in all the instances of the State.

- ✓ Assignation of **resources for gender equality and the fulfillment of women rights.**
 - At municipal level, to make effective the fulfillment of the article 22 of the budgetary guidelines, the women organizations **developed a methodology** (of training, elaboration of gender proposals, influence, monitoring, inspection and social control) to work with grass-roots women, councilors, and public workers of the municipal women areas **through which the specific demands and proposals are formulated to be incorporated in the Annual Operative Plans and budget of the municipalities, and then, the monitoring of its effective inclusion and the correspondent social control after its execution is made.** As the result of this process we can see that in 4 years we could multiply 9 times the investment of resources assigned to promote gender equality³⁰. The resources have been assigned to projects so varied as: support for the development of productive activities and training for the women economical organizations, the support of the SLIMS, the alphabetization and health programs for women, municipal nurseries and infrastructure for the care of elderly women.
 - Besides, at national level, Bolivia has been the first country in Latin America to made an **accountability exercise** of a National Policy for Gender Equality, thanks to which it could be possible to later **influence in the financial law** (law that is approved in the annual budgetary assignations) of the budget of 2011 and 2012 through the elaboration of the **Annual Operative Plans from diverse ministries, incorporating specific actions and programs to promote gender equality** or the access of women to productive means or health services.

- ✓ The work developed by Bolivian organizations to influence the budgets from the gender perspective has **generated an accumulation of theoretical and practical knowledge** built collectively from the knowledge of diverse women in different contexts. This knowledge is concretized, among other achievements, in the **categories of investment in gender equality** which are used to both analyze the amounts assigned and executed in the annual budgets, and to generate a common understanding about what means to "invest in gender equality" and to be able to orientate better the demands generated by women to influence in the annual operative plans. Among other results, it can be affirmed that the categories have permitted to³¹:
 - Make possible the creation of **investment in gender equality**, making easier the analysis of the effectiveness of public management with improvements in the orientation of the expending orientation and the elaboration of reports and gender responsible budgets at national, departmental, municipal and sectorial level³².
 - Contribute to the **gender analysis in the multiannual and annual plans, giving** importance to tools such as the "Gender check", to identify the causes of the oppression and subordination of gender and the way they are treated in the policies and their concrete expression in the development plans.

³⁰ In 2006 the resources registered in the Annual Operative Plans of the municipalities with which they were working were 2,694,200 Bolivian (approximately 384,885 US\$). In 2010 we already have a register with the municipalities in which the IFFI and the *Colectivo Cabildeo* have given impulse to the experiences of PSG, 23,879,989 Bolivians (approximately 3,411,427 dollars) were assigned.

³¹ Extract from Zabalaga (2012)

³² This reports can be obtained in the publishing of the Deputy Mionistry of Equal Oportunities of the Ministry of Justice, or in the web pages of the IFFI de Cochabamba, as in the Foundation *Colectivo Cabildeo* in La Paz.

- Contribute to the **constructions of demands from women** to orientate the incorporation of gender equality in the budgets, laws, regulations, development plans, resolutions and ordinances; and in national, departmental and municipal level. These establish that their use precision at conceptual and operative level, guarantees that the efforts of influence to be oriented effectively towards the diminution of the inequalities between men and women. At the same time, they contribute to the empowerment of women organizations in the processes of planning, budgetary assignation, accountability and transparency.
- Reinforce the **institutionalization of the gender instances** of the governments through the reinforcement of their capacities of analysis and proposal for the incorporation of gender equality in the planning and public budgets.
- Widen the framework of analysis in the public budgets, promoting a reflexion about the development vision, the economic model and fiscal policy and the fair re-distribution of the public resources oriented to equality and the full exercise of rights, from the intersectionality of gender, ethnics, class, and good living of women and men from all social sectors, including the holistic view of human and nature life.

The categories have also become a **conceptual reference for the work of the PSG** in Latin America, being used both in Bolivia and in other countries of the region.

These are some examples:

- In Bolivia: The Gender Observatory of the IFFI of Cochabamba publishes each year a ranking to view the percentage of the Budget assigned by each of the municipalities of the Department of Cochabamaba to all the categories. The Foundation *Colectivo Cabildeo* uses the categories to make a report about the investment made in five municipalities from La Paz and two from Oruro. Within the State, as well, the VIO adopts the categories and promotes their use in the whole country through a publication with the methodology for the raising and analysis of the budgetary information of the departments and municipalities. Using the methodology, this institution elaborated for the first time in 2008 a report in public investment in gender equality that contains an analysis of the budgets of all the municipalities of the country.
- In Rosario-Argentina, the “Women Colective for a PSG”, using the categories, made for the first time in 2010 the analysis of the amount budgeted for the municipality for gender equality, expanding it also in 2010 to the executed budget.
- In Santa Rosa de Copán, Honduras, using the concepts expanded in the investment categories, women could influence to increment the municipal Budget for gender equality actions in 2011 in 52% in relation with the funds assigned in previous years. At national level, in this country, the categories are the conceptual basis for the proposal developed by the National Secretariat of Planning to incorporate gender in the budgetary process.

The strategy of training and awareness developed with the organizations has generated **impacts of big importance both in the women that conform them, as in the organizations they belong to**³³, among them, the **individual empowerment**, determined through self-recognition, **group recognition and the construction of new images and representations about the power of decision itself**³⁴.

³³Some testimonies of women that have participated in those processes can be found at:
http://www.presupuestoygenero.net/index.php?option=com_content&view=category&layout=blog&id=227&Itemid=400160

³⁴ IFFI (2011)

According to the *Colectivo Cabildeo* (2012), the experience, among other results, has permitted to:

- Reinforce the capacities of the leaders, qualifying them to made repetition processes of training in their municipalities;
- The meeting of indigenous women and intercultural communities (urban);
- The conceptualization of proposals based on the recovery of experiences, knowledge and practices of women;
- The management of the tools for POA analysis;
- The social control and the incorporation of transparency elements.

The IFFI (2011) remarks how in this process, women have participated not only as people with ambition of individual power, but also in a community context, women also do it with the perspective of achieving a common objective that will bring not only personal benefits but for the whole organization. According to the beneficiaries, in this path of several years of training and participation in regional, departmental and national spaces, women organizations have been empowered and this has been translated in a relation between women and men with a greater equality³⁵.

In some cases, the empowerment is also produced from communal levels to others higher in the hierarchy, when they feel they are in condition to transmit these abilities.

In general, women who have participated in the training express to have more self-confidence, which is seen in their ability to express their ideas, not only in public spaces as the assemblies but also in the family level.

“I have seen myself improved, before this I had fear to speak too, now with all the workshops I have received I have improved myself, now I don’t have fear anymore, I also participate in my family.”³⁶

“I have improved myself a lot, I have had leadership so this gives me courage to speak in front of a group of people, I don’t have this fear anymore; I have quite improved my way of being.”³⁷

³⁵ IFFI (2011).

³⁶Interview to Celia Puyal 11/07/2011. Citado en IFFI (2011).

³⁷Interview to Cinda Siles 11/07/2011. Citado en IFFI (2011).

3.- Analysis of the process

3.1 Factors in the context that had a positive influence in the experience.

The Bolivian experience of influence in the fiscal policy and the public budgets of the women organizations is heavily conditioned by the process of change initiated in January 2006 under the Presidency of Evo Morales. This process is characterized, on the one hand, by the substantive reconfiguration of the correlation of forces in the political field, with the presence of new political subjects, particularly indigenous and farmers organizations, expressed through social movements and political projects with a strong cultural identity³⁸. This new scene obliges to rethink both the traditional methodologies of work as the concept of gender equality.

On the other hand, during this period, a constitutional amendment to modify the structure of the State and the forms of relation between public power and civil society is carried out. The constitutional process changed the structure of participation and representation at all levels (national, departmental and local) and set a central milestone in the political participation of women, mainly indigenous, which obtained a higher visibility exercising a strong leadership³⁹.

So, the new Political Constitution of the State, approved in February 2009, considerate and make viable the right of participation, recognizing and strengthening the rights and mechanisms of social control, participation, access to information and accountability. As the actors of the process expressed⁴⁰, this is not only a formal recognition, but also the social and women movements, recognized now as political subjects, make the right for themselves and execute it. *“For example, when a law is now launched, if they don’t make a consultation, people express their upset. It also happens in the construction of important policies and programs for which new participative spaces are open with social movements. Is a real benefit and not just a right”*.

After the approval of the Constitution a process of reform of the regulatory framework of the country started, through the elaboration of the Framework Laws, to give non precedent opportunities to influence in the transformation of the State. However, as it also have been remarked by the actors⁴¹, *“not only the base of the regulatory is cracked but also the day-to-day, in relation to what the State should do with the organizations but also the responsibilities of the organizations in relation to the public field”*.

Eventually, it is also important to remark that the experience of influence of the Bolivian women organizations about fiscal policy and public budgets has been heavily marked by the presence of committed women in the fight for equality. This greater presence was also important in the origins of the experience, in 2002, after the approval of the Quotas Law, that permits to increase and qualify the political participation of women in different electoral events. These advances have been expressed in the growth of the women representation in the Municipal Councils, the Departmental Assemblies and the Plurinational Legislative Assembly (where the Presidency of both Chambers is run by women).

This allowed, among other things, the conformation of local teams or the planning of a legislative agenda of women at national level. But also, depending on who were in the highest positions of

³⁸ IFFI (2011)

³⁹ *Colectivo Cabildeo* (2012)

⁴⁰ Interview to Silvia Fernández and Martha Lanza, *Colectivo Cabildeo*

⁴¹ Interview to Carmen Zabalaga and Tania Sanchez

power of political functions, and their willing to listen, it was possible to achieve new opportunities that achieved, among other, the approval of the guidelines or the incorporation of the budgetary classifications.

3.1 Main difficulties and strategies to overcome them.

As it was previously described, there are enormous regulatory advances, but there are difficulties to advance on their implementation. All the actors coincide that the principal difficulty to achieve this resides in the **persistence of patriarchal patterns**.

From the authorities, the view is that the State must generate policies for men and women and it is not understood the need to carry out specific interventions to face the existent inequalities and to reduce the gender gaps. They do not understand, too, the need to have a Ministry of Women and this has generated a great weakness in the actual mechanism which operates as a Direction of Gender Equality, within the Deputy Ministry of Equal Opportunities and that counts with few human and material media.

At **national level**, this has limited the work of key actors, as the Ministry of Economy and Public Finances, some of the authorities have not given the sufficient importance to the topic and it still exists resistances among the public workers. The difficulties also appeared because in some occasions the regulatory change does not have a correlative in the structure of the State and the instruments used. That means that, despite the strength of the changes, in the interior of many of the institutions of the State, the work is still being made as part of other scheme and it is faced from another conception.

This is a huge difficulty, because it exist a limit up to which the organizations of civil society can reach in the process of influence. Permeating the instances in charge of the public resources (finances and planning) requires a certain power.

The way to face this difficulty has been by means of political agreements and alliances at the highest level (as for example, with the Ministry Cabinet) and through the conformation of more extended technical-political instances as the technical commission on PSG (in which it participates among other: the Ministry of Justice- where the VIO is located-, Autonomies, the Ministry of Economy and Public Finances and the MNT-PSG) or the Interinstitutional Committee (in which the representatives of the VIO, the Plurinational Legislative Assembly and the MNT-PSG are present). In this instances it was possible to incorporate the key institutions of the budget (as Finances and Planning), thanks to the presence of Ministries or Assembly members that “demand” their presence arguing that it necessary that the Bolivian State answers what the Constitution says about equality.

At **local level**, and despite the favorable regulatory framework, women still face important resistances by the political authorities to their participation in the decision-making spaces. Many of these authorities still have a traditional view in relation to women, in which they privilege their role of mothers, linked to the needs and interests of the family and in contraposition to their participation in the public fields.

All the exposed is added with the difficulty women have to participate due to their time limitations and because their families do not assume as important their participation in the political field. In most of the cases, the private field does not change, and that implies that sometimes the participation is made at expenses of a big sacrifice for women and that is inflicted fundamentally in those that do not have a very high reproductive work charges.

But even when women achieve their participation, they sometimes face the non-compliance by the municipal authorities of the demands and proposals that they achieve to incorporate in the POAS, or they face other type of difficulties and resistances to the access to the information. This makes difficult the consecution of the objectives expected and it generates frustration among the women themselves in the exercise of their rights.

This difficulties have been counteracted searching alliances with women in the interior of the municipal instances, widen their social basis and also through processes of training and awareness to both the authorities and the women themselves, although in this sense, there are still a long path to go.

3.2 Strengths and weaknesses.

The following chart shows a summary of the main strengths and weaknesses of the experience:

STRENGTHS	WEAKNESSES
The organizational tradition and participation social and women organizations have in Bolivia and their strong presence	Limited possibilities to build greater alliances or among the variety of institutions that work for gender equality in the country , to influence in fiscal policy and public Budget. This is because this topic has not yet been incorporated in the agendas of many social organizations of women of the country, because many of them see the PSGs only as a “tool”, not conceiving its political and transforming character.
The existence of institutions that have worked for long years with a strong commitment towards gender equality and women rights (As the AMUPEI, the Women Coordinator, the <i>Colectivo Cabildeo</i> or the IFFI), which took position for the difficult task of influencing in the public budgets and to do so, they articulate themselves and with other institutions through the MNT-PSG.	Weakness of the articulation mechanism. The MNT-PSG had a strong and powerful start, but with time it has loose its strength. This has it reason, partially, in the dynamic of the country, so demanding in terms of the elaboration of proposal, that has not permitted to strengthen the mechanisms for its coordination, to expand its capacity and to train people to work the topic of PSG from the Bureau as a space with self-identity (beyond the work made from the organizations that conform it)
Existent alliances: Apart from the articulation, very important alliances with very committed political women have been generated (ministries and parliamentarians), who are also supported by technical-political instances to elaborate and discuss proposals such as the technical commission in the PSG or the Interinstitutional Committee .	Institutionalization of the incipient process. Though the influence in the regulatory framework has been achieved, we still need to strengthen the institutionalization of the process at the level of strategic and operative planning and the reinforcement of the of the instances of the State that have to carry out the implementation of the laws (starting for the VIO itself and generating its own mechanisms within the ministries of planning and finances)

STRENGTHS	WEAKNESSES
<p>Collective construction from the different types of women. The permanent participation of the women organizations in the processes and the work in consultancy with them have permitted the proposals to be elaborated in basis to the recovery of experiences, knowledge and practices of the women themselves.</p>	<p>Still limited capacity in women organizations to build solid argumentations to achieve a better defense of the proposals. When we want to influence in the budgets it is necessary to converse with people who work with a completely different logic and this requires very solid arguments whose construction requires from time and specialized knowledge. This added to a context of permanent change, the opportunities to influence are expanded and diverse and now the organizations do not have the capacity to fill all the emptiness. Until 2005 women organizations have never been involved in the work of the public budgets. So, even if we have been working on training and capacity building in specific competences and abilities, related to fiscal policy, finances, public management, etc, the knowledge is still insufficient to cover the demands and needs.</p>
<p>Institutional commitment of the UN WOMEN: The economic support and the political commitment of one institution such as UNIFEM (now UN WOMEN) through time (10 years) , has made easier the continuity in the process, permitting to build on the advanced and giving support to the achievements already made. This also help to count with many people all time involved and to widen the alliances generated in the beginning.</p>	<p>Still limited support of other cooperation agencies in the country. In Bolivia, the rest of the cooperation agencies have not treated the topic, not because they are not interested in it, but because there are a change of agenda that responds to global more than local. There are some agencies that have retired from the project and there are some uncertainties over the possibility that the UN WOMEN continues to support duet to the institutional changes and the finalization of the programs related to PSG in the country.</p>
<p>Regional exchanges with existent experiences: Other of the strengths about counting with the support of UNIFEM/UN WOMEN has been the possibility to carry out regional exchanges, in which the achievements could be visible but also to learn from other experiences to reproduce them.</p>	

4.- Challenges for the future

The experience of influence in the fiscal policies and public budgets of the women organizations in Bolivia counts with very important advances and results. However, we can also find big challenges:

- ✓ Even if the women organizations have developed a technical background and a solid theoretical argumentation about the importance to invest in gender equality, it requires an **improvement in the strategies of political negotiation**. Searching other kind of strategic allies, not necessarily convinced of the importance of the topic but who saw the political opportunity.
- ✓ It is also important to **build more solid alliances** with the political subjects recognized by the State as the original indigenous and farmer organizations. These organizations have nowadays other political priorities and to achieve a better articulation with their agendas means showing better the transforming potential the PSGs have in the process of abandon of the patriarchal model and decolonization.
- ✓ At municipal level, despite having advanced in the assignation of resources, **the percentages identified in the Investment in Gender Equality still express an inequality assignation in the general budget** and a limited scheduling of resources for investment in gender equality. At national level, even if we have classifications that permit to know the assignations for gender equality it has not been possible to modify the budgetary assignations. It is for this that it is important to make the Ministry of Finances involved in the work in a more proactive way, promoting the use of the classifications and developing a monitoring system to make the effective tracking to the execution of the resources.
- ✓ At the municipal level, **it is very important to expand the already established alliances with the Ministry of Autonomies**, supporting in the development of competitive Accountability that will define how much the decentralized governments should assign in the development of their attributions.
- ✓ It is also important to **expand the influence towards the system of strategic and operative planning**. In the first case to achieve the incorporation of gender equality as part of their objective and in the second to improve the possible impacts of the programs.
- ✓ Achieve the expansion of the social basis that support and sustain the influence processes also requires to **face changes in the private and reproductive field**, because, as we have seen before, many women find serious limitations to their participation due to these aspects.
- ✓ Eventually, other of the challenge points to the need to **quantify and improve the knowledge of all the women organizations and public workers**. Continue to enforce and expand the processes of training and capacity building that have been developed about specific competences and abilities on fiscal policy, finances, public management, etc., to have a better view of the processes and to make “consistent” proposals.

5.- Sustainability:

One of the more important factors that contribute to the sustainability of the Bolivian experience is the fact that the obligation to assign resources is already present in several **regulations (as the LMDA or the Integral Law against Violence**, as well as the budgetary guidelines).

At the level of the **State**, the most important element that supports to sustainability is that the topic appeared in the high-class public agenda (in the Ministries Cabinet) and in some of the institutions responsible for implement those laws, as the SEA, that have recovery it as part of the competential accountability policies and services that have to be at disposal from the different part of the government (national, departmental and local).⁴²

In relation to **civil society**, the topic of the PSG is since a long time part of the agenda of many women organizations, which work well as central part of their activism (as the IFFI or the *Colectivo Cabildeo*), or as part of their permanent strategies to other types of processes (as the Women Coordinator or the REMTE).

At **local level**, too, it has been possible to take a position so every time we work in a right or a regulation, it has to be resources assigned and the councilors and organized women it counts with a greater capacity and they are more and more empowered in their exercise of enforceability to face the accomplishment of the law. Besides, by using the categories we have clear lines about where to propose the investment, and it has been possible to achieve strategic articulations between the gender and the social demands that involve other sectors.

6.- Lessons learnt and potentially replicable.

As we have seen, the Bolivian context offers a singular framework to face the influence in fiscal policy and public budgets from the women organizations. However, all the actors remark that both the **generated knowledge in relation to the investment categories in gender equality** and the **methodology and the tools to work in the processes of enforcement or the women organizations** are elements with a **high replication potential**, as it has being done in several countries of the region.

In relation to the **lessons learnt** that have to be taken into account by similar experiences, we can highlight the following:

- ✓ One of the key factors in the achievements of the Bolivian experience is, without any doubt, the **articulation achieved with the institutions and women networks** that conform the National Bureau of Work in PSG (MNT-PSG), in relation to a topic assumed as strategic.
- ✓ The proposals generated in that articulation space were enforced through the **feedback of the socialization processes, the training and the building of demands and proposals**, made with the women organizations at municipal, departmental and national level.
- ✓ When we work in the analysis of the budgets and in the building of demands to influence on them, **the investment categories help to recognize the different discrimination axes and it permit the assignation of the resources**, not only in the traditionally considered social areas

⁴²With the LMDA new competences are created to analyze who is in charge and how much does it cost: the SEA defines what can be done at each instance according to its competence and they account it and make their viability analysis.

(as health, education, housing, etc...), but also in infrastructures, production, employment, communication, justice, etc.

- ✓ Besides, we must **analyze the specific inequality situation women live in each context** for each place, using surveys and statistics that include gender indicators in relation to other dimensions (as the generational, the ethnical and race differences, etc.).
- ✓ **The costing exercises helps to transform the idea of “demand” or “stock market of projects” in something concrete** which is also “budgetable”, establishing parameters among the needs (the desirable) and the possibilities (what is viable in budgetary terms). The costing permits to generate stronger alliances with the State because we work in concrete proposals, elaborated in its same language (what and how much are we going to need).
- ✓ Other of the most important learning is to **conceive politics as a complex interaction and usually conflictive between the civil society and the State**. To fully exercise the women rights and to make visible its condition of exclusion, subordination and inequality, it is as important to influence in the State (because it creates the conditions for the exercise of those rights) as in the civil society, where from different groups of interest and social actors proposals sometimes in confrontation can be generated. In these spaces, it is fundamental that the women organizations develop their abilities for deliberation, technical and political founding and negotiation.
- ✓ In the influence processes in which the high level authorities intervene it is necessary to **focus in very specific topics identifying concrete results to achieve in the short term**. So we can maintain the political wills and avoid their fatigue. This can sometimes require the fixation of small goals, although we should not leave unattended the fiscal policy framework and the also the need to advance in its transformation to achieve fairer and more redistributive systems.
- ✓ Other of the relevant learning has been to **assess the political importance of the public information**. This is a key element for the full development of the exercise of participation and social control. So, we have to look for the legal frameworks that give support to the right of information and to reinforce the mechanisms of transparency and accountability.

7.- Recommendations

As the Bolivian women organizations have proved, fiscal policy and public budgets are a space in where the defenders of women equality and the rights of women can and should influence. This presence is fundamental not only as part of the exercise of participation and social control, but also as a strategy for the enforceability of rights, because unless we have resources for their implementation, the political commitments, the laws and the plans cannot be properly accomplished.

However, to carry out this influence, women organizations require support and reinforcement to train them and to count with specialized knowledge, but also to be articulated and coordinate better their legal strategies and social control.

International cooperation has played an important role in these supports, because they permit the organizations to work in a sustainable way and they also establish articulations and learning with other experiences of the region. It is also important to support the generation and expansion of the knowledge in a topic, until now, not very present in the agenda of the defenders of gender equality.

The State has also a responsibility that cannot be unattendant, because the influence from the civil society has a limit on its capacity to transform public policy and in particular, fiscal policy. So, apart from the political will, the State should also have the capacities and technical competences to carry out a fairer and more redistributive fiscal policy in terms of gender and to run policies and programs to respond to the needs and demands expressed by women in the exercise of an active citizenship.

Many are the results reached, but they are also derived from joint efforts that must continue to be supported to make fiscal policy and public budgets, a driver of transformation in the achievement of social and gender equality.

8.- Final recognitions

The present case study has been possible thanks to the information and the contributions made by:⁴³

- ☺ Cecilia Estrada, Former Director of the IFFI
- ☺ Silvia Fernández, Responsible for the PSG program of the *Colectivo Cabildeo*
- ☺ Martha Lanza, Coordinator of Programs of the *Colectivo Cabildeo*
- ☺ Leonor Patscheider, Former Responsible of the Program of Local Development of the IFFI
- ☺ Inés Pérez, Gender Director of the VIO
- ☺ Tania Sánchez, Coordinator of the PSG Programs of the UN WOMEN Bolivia.
- ☺ Carmen Zabalaga, Former coordinator of the PSG Program of UN WOMEN Bolivia.

The study also used the existent systematizations about the Bolivian experience that are available in the following documents:

- *Colectivo Cabildeo (2012): Deliberación para la Incorporación de la Igualdad de Género en las Políticas Públicas Sistematización de la Experiencia 2009-2011 (Deliberation of the Incorporation of Gender Equality in the Public Policies. Systematization of the Experience 2009-2011).*
- *IFFI (2011): Sistematización del proceso de Acceso a la Información Ciudadana y Rendición de Cuentas a Autoridades Municipales del Municipio de Cercado-Cochabamba (2003-2010).(Systematization of the process of Access to the Citizenship Information and Accountability to the Municipal Authorities of the Municipality of Cercado-Cochabamba (2003-2010).*
- *UN WOMEN (2011): Ficha De Comunicación “Metodología De Deliberación en la Incorporación de Políticas y Presupuestos Sensibles a Género en la Gestión Pública” Fundación Colectivo Cabildeo. (Communication File “Methodology of Deliberation in the Incorporation of Policies and Gender Responsible Budgets in the Public Management”.*

⁴³ Appearance in alphabetical order.

- UN WOMEN (2011): *FICHA DE COMUNICACIÓN “Metodología de Acceso a la Información y Rendición de Cuentas” Instituto de formación Femenina Integral – IFFI. (Communication File “Methodology of Access to Information and Accountability”. Institute of Integral Femenin Training- IFFI).*
- Zabalaga, Carmen (2012) *Sistematización de la Experiencia “Categorías para el Análisis y la Orientación de la Inversión Pública en Igualdad de Género en Bolivia”.* (Systematization of the experience. “Categories for the Analysis and the Orientation of the Public Investment in Gender Equality in Bolivia”.) UN WOMEN.

9. Acronyms list

SIGLA	DESCRIPCIÓN
ACOBOL	Asociación Nacional de Concejalas de Bolivia. <i>National Association of Counselor of Bolivia.</i>
AMUPEI	Articulación de Mujeres por la Equidad y la Igualdad. <i>Articulation of Women for Equality.</i>
CENCAP	Centro Nacional de Capacitación. <i>National Centre of Training</i>
CIDES – UMSA	Postgrado en Ciencias del Desarrollo de la Universidad Mayor de San Andrés. <i>Postgraduate in Development Sciences of the University “Universidad Mayor de San Andrés”.</i>
COCAMTROP	Confederación de Mujeres Campesinas del Trópico de Cochabamba. <i>Confederation of Farmer Women of the Tropic of Cochabamba</i>
CONAMAQ	Consejo Nacional de Ayllus y Markas del Qullasuyu. <i>National Council of Ayllus and Markas of the Qullasuyu.</i>
IFFI	Instituto de Formación Femenina Integral. <i>Institute of Integral Femenin Training</i>
LMAD	Ley Marco de Autonomías y Descentralización. <i>Framework Law of Autonomies and Decentralization.</i>
MNT-PSG	Mesa Nacional de trabajo en Presupuestos Sensibles a Género. <i>National Bureau of work in Gender Responsible Budgets.</i>
ODMs	Objetivos de Desarrollo del Milenio. <i>Millenium Development Goals.</i>
UN WOMEN	Entidad de las Naciones Unidas para la Igualdad de Género y el Empoderamiento de las Mujeres. <i>UN Entity for Gender Equality and the Empowerment of Women.</i>
OTBs	Organizaciones territoriales de Base. <i>Grass Roots Territorial Organizations.</i>
PDM	Planes de Desarrollo. <i>Development Plans</i>
PNIO	Plan Nacional de Igualdad de Oportunidades. <i>National Plan of Equal Opportunities.</i>
POA	Programa Operativo Anual. <i>Annual Operative Program.</i>
PSG	Presupuesto Sensible al Género. <i>Gender Responsible Budgets.</i>
SLIMs	Servicios Legales Integrales Municipales. <i>Integral Municipal Legal Services.</i>
SPIEP	Sistema Integral de Planificación del Estado Plurinacional.

	<i>Integral System of Planning of the Plurinational State.</i>
SEA	Servicio Estatal de Autonomías. <i>State Service of Autonomies.</i>
REMTE	Red de Mujeres Transformando la Economía. <i>Network of Women Transforming Economy.</i>
UNFPA	Fondo de Población de las Naciones Unidas. <i>Population Fund of the United Nations.</i>
UNIFEM	Fondo de Desarrollo de las Naciones Unidas para la Mujer. <i>UN Development Found for Women.</i>
VIO	Viceministerio de Igualdad de Oportunidades. <i>Deputy Ministry of Equal Opportunities.</i>