

Mexico: Collaborating with a wide range of actors

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Table 7: Selected Indicators for Mexico

<i>Indicator</i>	<i>Year</i>	<i>Number</i>
Population	2000	97,483,412
% of population which is female	2000	51%
% of population which is urban	1995	64%
Gross Domestic Product (GDP) per capita (US\$)	1999	8297
Human development index (HDI)	1999	0.790
Gender development index (GDI)	1999	0.782
% of total budget funded by donors		n/a
% of national parliamentarians who are women	2002	16%

Introduction

This chapter describes the development of the Mexican gender budget initiative. The initiative started out as the effort of a nation-wide feminist network, integrated during its first years a research centre that specialised in budget analysis, and later on reached into governmental structures. Along the way, the initiative has incorporated experiences, efforts and the work of other networks and organisations, and inserted the topic of gender-sensitive budgets as an item in the political agenda. It has grown in strength due to its diversity, as well as by integrating two essential components in a primarily political endeavour. These elements are the active advocacy capacities of women's organisations and the solid technical skills of a policy research centre.

The first part of the chapter describes the way in which the initiative came together, in order to illustrate the strength of the groups behind it and the dynamic of the process. The second part focuses on the change in government and the way in which the reconfiguration of the political agenda was used to advance the initiative. The third part

describes how collaboration with a selected sector, the Department of Health, has increased the scope of the initiative. The chapter concludes with an analysis of the initiative's strengths and weaknesses, and also provides a perspective on what could have been done differently.

How the Initiative Started

In 1993, a broad range of women's organisations, feminists and academics came together to prepare for the International Conference on Population and Development (ICPD), to be held in Cairo in 1994. Participants were concerned about the imposition of population control policies on poor women living in developing countries. Their main objective was to put women on the centre of the stage, as human beings with human rights. Cairo turned out to be the right place, at the right moment, for claiming a radical change in the predominant perspective. The Conference did not set a decrease in population as a goal. Rather, it achieved a substantial shift towards the advancement of reproductive rights for every human being. Furthermore, a more *humane* understanding of development goals and society's underlying gender inequities was reached (Espinosa, 1999: 27).

This initial collaboration among diverse Mexican groups turned into the Foro Nacional de Mujeres y Políticas de Población (Foro), a network that links together almost 80 women's organisations working in 17 out of the 32 states in the country. The main objective of the Foro is to ensure that the agreements reached and the benchmarks set at Cairo by 184 countries become a reality.

In 1999, when the first revision of the ICPD Programme of Action (PoA) was due, there was widespread concern among feminist organisations that the reproductive health perspective adopted in Cairo would be pushed back. It was believed that governments would argue that this holistic approach was too expensive to be consistently carried out. At the same time, the organisations suspected that the financial commitments of both governments and multilateral agencies had not been implemented. The PoA explicitly states that two-thirds of the resources allocated to 'human development' in developing countries should come from national sources. It states further that, in addition to the 0.7 per cent of Gross Domestic Product (GDP) for development assistance, 5,700 million dollars should be channelled from North to South.

Motivated by the need to know where Mexico as a nation stood in relation to ICPD's financial goals, a group of high-profile researchers of the Foro carried out an initial analysis of trends in federal programmes and spending regarding reproductive health. The study found that, between 1993 and 1996, federal expenditure in reproductive health dropped by 33 per cent in real terms, while government health expenditures in general dropped by an astounding 36 per cent. IMSS-Solidaridad, a nationwide health programme supporting Mexico's poorest people, was allocated only 3.8 per cent of the 1996 federal health budget to cover the needs of over 14 million people.

Furthermore, case studies of four states illustrated the narrow application of the concept of reproductive health. The research highlighted the inequities faced by different groups of women regarding birth control methods, maternal mortality and comprehensive attention to their health requirements. The analysis looked at diverse axes of discrimination stemming from class, ethnicity, age and the urban-rural split.

Simultaneously, a series of public finance workshops for women leaders was launched by Equidad de Género, Ciudadanía, Trabajo y Familia (Equidad), a feminist organisation operating within the nationwide network of the Foro. The path-breaking study of reproductive health expenditure, together with the opportunity of having public officials addressing questions about the federal budget, underscored the critical need for tools to advocate for a more gender-sensitive allocation of resources.

Meanwhile, pressure to integrate a gender perspective into public institutions and policy-making processes increased. The establishment of state and federal committees on gender and equity provided an opportunity for women to express their political views formally, and thus influence public policies. As a direct result of the creation of a gender desk within the Department of Social Development, a gender equity provision was established as part of the operational framework of anti-poverty programmes. This provision stated that every programme should allocate 50 percent of its resources to women.

The Focus on Anti-poverty Programmes: Building up a Joint Initiative

In 2000 Equidad and Fundar, a think tank mainly dedicated to applied budget research as a means of promoting democratisation, started a

joint project on gender-sensitive budget analysis. The project operated at federal level as well as in four states. It began by training and collaborating with groups belonging to the Foro, a feminist political association called Diversa and the network Milenio Feminista (Milenio). The collaborative effort reached out to a broad audience, linking together two essential components: the solid technical skills of a research centre and the broad advocacy experience of feminist organisations and networks. The initiative was primarily supported by the Ford Foundation, as well as by Population Action International and General Services.

During its first year, this collaborative initiative focused on 21 government-funded anti-poverty programmes. Two crucial issues were examined: First, the initiative looked at whether and how neutrally framed programmes acknowledged and addressed the limits and structural difficulties faced by women. Second, it examined whether women's immediate needs were being covered and their capacities built.

At state level, analysis centred on two specific efforts of the anti-poverty strategy. The first was a programme of basic health extension to communities with no formal access to health services (Programa de Ampliación de Cobertura, PAC). The second was the anti-poverty programme of the federal government, Programa de Educación, Salud y Alimentación (PROGRESA). PROGRESA has been considered to be the most comprehensive and important approach to poverty reduction on the part of the Mexican government, encompassing health, education and nutrition. PAC operated under a five-year loan from the World Bank, while PROGRESA is funded directly by government.

The initiative's focus on the poorest and most marginalised sectors of the Mexican population was particularly important given the socio-economic context. The economic crises of the 1980s led the Government to implement several economic stabilisation and structural adjustment programmes. The currency was devalued, fiscal austerity was imposed and public expenditure as a percentage of GDP was steadily reduced. These measures had a direct impact on society, and especially on women living in near poverty conditions. Real wages fell and the resources available to meet basic needs diminished. As a result of shrinking employment opportunities and negative wage growth, extreme poverty affected 27 million people in 1999 according to official data, and twice as many according to independent researchers (Boltvinik, 2000: 12).

Research (Vinay et al, 2001) also found that half of all the anti-poverty programmes registered cutbacks from 2000 to 2001. These cutbacks affected nutrition, basic housing, temporary employment and community services. Among the 21 programmes analysed in more detail, only four were specifically targeting women, while six made an explicit reference to a gender perspective in their guidelines. Of these six, half registered cutbacks. The actual amount of money being spent on women by each of the programmes was difficult to estimate due to the lack of gender-disaggregated information. Both PROGRESA and PAC relied for their operation on the extension of women's traditional roles in nutrition, health and reproduction, implying additional and unpaid work.

Research carried out at sub-national level (Aguilar, forthcoming; Freyermuth, forthcoming) pointed to a limited vision regarding women's health needs. Generally speaking, the concept of comprehensive health services and recognition of gender inequities were absent. The criteria used to select the diseases to be addressed by the programme failed to establish clearly the different epidemiological situation of women and men. Although PAC included, among its thirteen actions, three which are specifically oriented towards women, the omission of gender criteria resulted in an inefficient assignment of resources. Furthermore, the specific actions to address women's health problems were not implemented with a gender perspective.

The Change in Government: New spaces for participation and a focus on health

In July 2000 a historic change reshaped the political landscape of Mexico. After over 70 years of one-party rule by the Partido Revolucionario Institucional (PRI), the centre-right Partido Acción Nacional (PAN) won the federal election. As in transition processes elsewhere, it was recognised that this change would open major windows of opportunity to influence the new government's agenda. Nevertheless, the feminist movement also expressed concern about the possible promotion of a conservative agenda. The time frame for defining spaces of participation and making full use of them in order to have an input into the policies of the coming years was crucial.

A forum on gender and health

The initial research of Foro, and the activities carried out regarding

targeted expenditures for women and anti-poverty programmes by Equidad and Fundar, gave the gender budget initiative the leverage needed to push the topic of gender-sensitive spending further. At the beginning of 2001 discussions began among the different groups involved in the gender budget initiative and UNIFEM, in order to foster a concrete space for addressing health policies. The World Health Organization (WHO), the Pan American Health Organization (PAHO), the United Nations Population Fund (UNFPA) and the Department of Health were part of the effort.

In an environment of openness and consultation, a three-day forum was officially endorsed by the Department of Health. The main purpose was to generate proposals to be fed into the development of the six-year sectoral programme of the Department. The forum had an ambitious agenda, covering a broad variety of topics dealing with the complete life cycle of women. It was also the space for the announcement of a new government programme, 'Woman and Health', aimed at mainstreaming gender throughout the sector.

Plenary sessions addressing general concerns regarding gender and health were presided over by the Minister of Health, with the participation of national and international experts. These sessions set the tone for multidisciplinary working groups that focused on particular problems in a collaborative and interdisciplinary way. Each session presented a three-fold perspective: that of governmental agencies, research or academic institutions and civil society.

The closing plenary of the forum was used to introduce a new element into discussion, namely the need to advance towards a gender-sensitive health budget. The presentation in this session highlighted the difficulties faced by Foro's initial research as a result of the lack of appropriate budgetary information and gender-disaggregated data. The impossible task of identifying the budgetary dimensions of diverse components within specific programmes or units, as well as their beneficiaries, was underscored. Further complications were mentioned, such as the difficulties of linking up budget allocations and assessments, impact evaluation and, last but not least, efficiency (Hofbauer, 2001).

Input into the National Health Programme and further steps

As a result of the forum, dozens of specific proposals regarding all the

topics covered by the plenary and working sessions were personally handed to the Minister of Health in order to be fed into the National Health Programme. Legislative reform, programme design and evaluation, research and training activities, communication, gender-sensitive budgets and the need for comprehensive services – including mental health, addictions and violence – were highlighted.

These actions, the broad coalitions behind them, the seriousness of the proposals and the commitment of the Department of Health made it possible to lay the initial ground for a constructive and collaborative relationship. Furthermore, the creation of a technical committee within the Woman and Health programme, aimed at consolidating a formal space of interaction, collaboration and follow-up of these proposals, was suggested and welcomed. The committee was composed of a diversity of actors, in order to contribute to the aim of mainstreaming gender into the whole array of activities to be undertaken by the Department. Working groups were defined and a gender-sensitive budget group was established. The idea of gender-sensitive budgets had thus reached the policy agenda and achieved formal endorsement.

A Glance inside the Process: The Difference between Knowing the Path and Walking the Path

Initial steps

As part of the activities carried out with the Woman and Health programme, a review of the programmatic structure of the whole Department of Health was undertaken. The review sought concrete ways to make initial steps towards the introduction of gender criteria into its main framework. Despite taking place during the new administration's first stage of budget formulation, specific proposals to change the programmatic structure were not put forward. Due to both the inexperience of the administration and lack of time, programme and budget officers stuck strictly to 'proved and tested' formats.

Simultaneously and during the rest of 2001, the Mexican gender budget initiative developed different approaches in order to reach out to government departments, committees in Congress, parts of the national women's machinery, media and other organisations of civil society. At the national level, several training and sensitisation workshops were conducted, and a formal event in Congress was

launched by Equidad and a broad coalition of NGOs calling for “more equitable spending”. Attention was thus increasingly drawn to the topic.

These activities were further strengthened and complemented by work at the sub-national level. The team in Chiapas engaged their own newly-elected provincial government. They ran workshops for public officials and the state-based institute for women, and submitted the results of their analysis to government departments. Their long-standing experience on health issues, particularly maternal mortality, and their solid technical analysis opened up spaces for dialogue and participation.

The team working in Queretaro inserted its budget research and activities into the broader campaign ‘Women’s Eyes on the World Bank’, which operated in several states of the country. As a result, they also engaged directly with state and federal structures, particularly those responsible for implementing the health extension package (PAC). The friendly relations established with the Department of Health, the results of their research, and the political work regarding the inclusion of gender-sensitive budgets in the agenda all fostered further opportunities for dialogue and exchange.

A Second Step: A workshop for public officials

During the last four months of 2001, the Woman and Health programme, along with the groups involved in the gender budget initiative, started planning a workshop. The target audience was public officials implementing health extension programmes for the poorest sectors of society. Building on previous experiences, the workshop addressed general issues regarding gender, with the aim of fostering an understanding of the socially constructed differences between men and women. In order to illustrate the differentiated impact of neutrally defined programmes on women and men – and on different groups of women and men – the group chose to focus on two out of 13 components of the basic health package, namely diabetes mellitus and family planning. This workshop was the first formal attempt to bring officials involved in planning, budgeting and programme design of the Department of Health into a workshop to discuss gender-sensitive budgets.

The working session illustrated the differences in design, prioritisation and allocation of resources resulting from a gender focus. The practical

exercises carried out were based on official information, covering the following:

- ◆ the epidemiological information that the Department of Health itself generates,
- ◆ the normative frameworks and procedures that regulate governmental actions regarding family planning and diabetes mellitus,
- ◆ the socio-demographic profile of a specific state,
- ◆ the programmatic components of PAC and its budgetary allocations.

As a result of a set of questions answered during the day, it became evident that in order to address the specific needs of women and men consistently, additional criteria had to be incorporated and resources allocated accordingly. Furthermore, it became clear that, in order to foster gender-sensitive budget allocations, a similar process had to be undertaken by every single unit of the Department. This realisation provided a perspective on the time frame within which the concept of gender-sensitive budgets moves ahead.

Despite again working during the formulation stage of the budget process, major changes could still not be expected. Willingness, commitment and official endorsement granted the opportunity of working in that stage, but capacities to develop a comprehensive and far-reaching process aimed at engendering the budget are just starting to be in place.

An initial guide on gender-sensitive budgets for the Department of Health

Building up gender-sensitive budget literacy among public officials, in a wide-ranging and consistent fashion, is a much-needed step in order to turn the expressed commitment and openness of the Department of Health into actual results. The challenge is two-fold. On the one hand it means repeatedly illustrating the need and the logic behind gender-sensitive programmatic design and allocation of resources. This, in itself, is a long road. On the other hand, the Mexican gender budget initiative itself has to make a conceptual leap from gender budget analysis to gender-sensitive budget formulation. Despite the initiative not being responsible for actually drawing up the budget, and thus not knowing internal technicalities, the urgent need to have clear

suggestions on how to actually engender the budget keeps increasing.

It was recognised that without clearly explaining what gender-sensitive budgets are about, and what their development implies, progress would be limited to a few targeted expenditures. It was therefore decided that the most appropriate step was to aim at wide-ranging sensitisation. As a result, the case studies discussed in the workshop, as well as other documents on gender-sensitive budgets, were put together in a handbook published by the Department of Health. This handbook was distributed to every head of a directorate, state-based department or institute, and local-level health jurisdiction during mid-2002.

The message of the handbook is clear and simple, namely that budgets and programmes are not neutral, gender and sex are not the same, and that in order to address the needs of women and men and different groups of women and men, the socially constructed differences and opportunities have to be acknowledged. Equity, transparency, accountability, efficiency and effectiveness are explained as some of the positive by-products of a gender-sensitive resource allocation. Finally, the questions that guided the workshop with Department of Health officials, and the conclusions reached for each case, are discussed so as to suggest an approach to what has to be done in order to achieve these ends.

The handbook will be the first in a series to be published throughout the administration. The Department of Health will assist in engaging at least some units into supported processes in order to start the next planning phase with a gender perspective and analysis already in place. In the words of the Minister of Health, “the Ministry is committed to developing a methodology for the gender-sensitive formulation of the sectoral budgets... in order to progressively achieve their institutionalisation towards the end of the current administration” (quoted in Hofbauer et al, 2002: 15).

Additional Activities of the Gender Budget Initiative

On a parallel path to the one being walked with the Department of Health, the Mexican gender budget initiative has been growing and diversifying. After two years of a joint, collaborative project aimed at building up budget literacy and analytical capacity among the groups in the initiative, several diverse projects have evolved. Interest continues to grow, and opportunities continue to arise.

Maternal mortality

One of the projects currently being carried out by Fundar, together with two state-based groups of Foro and Equidad, aims at evaluating the impact of the budget's resource allocation in the reduction of maternal mortality. Although the ratio of maternal mortality in Mexico reflects a downward tendency (from 5.4 per 10,000 live births in 1990 to 4.9 per 10,000 live births in 1999), this achievement still places the country at a considerable distance from the targets agreed on in Cairo. According to the official report of the Department of Health, 68.3 per cent of maternal deaths occur among the population without social security assistance. As such, maternal mortality is closely related to lack of access to health care and emergency services.

This project brings the state of Oaxaca into the initiative, and continues the work in Chiapas. These two states have the highest maternal mortality rates in the country. The project builds on research, fieldwork regarding access to, and quality and availability of, the needed services, as well as on the scope of actions being implemented.

Decentralisation

The project 'Participatory Citizenship and Government Accountability for Gender-Sensitive Public Spending' focuses on accountability and, above all, on building a participatory citizenship capable of playing an active role in advocacy and monitoring the distribution of budget resources. The project is carried out by Equidad, with three teams working at state level in Chiapas, Oaxaca and the Federal District. Fundar is involved on the technical side.

Participants in both Chiapas and the Federal District are analysing decentralised resources for health services, while the initiative in Oaxaca aims at building the role of women in decision-making processes regarding resource allocation of decentralised anti-poverty funds at municipal level.

The main objective of the decentralisation project is to contribute to increasing gender-sensitive public spending and achieving transparency of public budgets. It hopes to do this by advocating for government accountability and proposing concrete changes in public policies at federal and state levels.

National and sub-national women's machineries

During 2001 the gender budget initiative began interacting with national and sub-national women's machineries. Proposals to include gender-sensitive budgets in the National Pro-Equity Programme, which structures the activities of the national women's machinery, were presented at a nation-wide consultation carried out by the government. Training and presentations were given in several states throughout the country.

With the support of the United Nations Development Programme (UNDP), an initial two-day workshop for the National Women's Institute was undertaken at the beginning of 2002. Subsequently, a formal project of collaboration between the Institute, Fundar and Equidad has started. The main objective is to identify concrete ways in which the Institute can use its mandate of mainstreaming gender into all sectors of government in order to promote gender-sensitive budgets.

Following the example of the process with the Department of Health, training and analysis of programmatic criteria will be undertaken in other sectors. Simultaneously, an eight-hour session on gender-sensitive budgets has been included in a comprehensive training course on gender and public policies. This training course is attended primarily by officials of the state-based women's machineries and other departments.

Lessons Learned and Pending Challenges

Writing this chapter has meant reflecting on the different aspects that have given the Mexican gender budget initiative its current shape. Sitting down and taking notes of the processes in which we are engaged on a daily basis is unfortunately something most advocates forget to do under the continuous pressure of responding to immediate events. Such reflection is, however, crucial in order to identify those elements that give strength to what we are doing, as well as the ones that need to be further developed.

The first strength of our initiative lies in the collaboration among diverse actors with complementary skills. This is especially important given the initial location of the initiative in civil society. On one hand, the keen political vision and advocacy capacities of women's organisations, and their ability to open up processes through the legitimacy of broad-based nation-wide networks, has been a crucial

element. On the other hand, the development of solid research capacities, as well as of clear arguments based on that research, has been key to developing the ability to engage in technical arguments with those who are responsible for budgets. The combination of these two factors, pictured as the two legs of applied budget analysis, are probably the single most important strength of the Mexican initiative. Budget analysis is doomed to fail if it is restricted to academic documents which are detached from real concerns and thus fail to drive the actions of real people. Similarly, advocacy without solid information is unlikely to go far.

This initial strength is the basis of the initiative's ability to create awareness around the need for more equitable and gender-sensitive budgets. A second strength has been the ability to push the issues of gender-sensitive budgets and equitable spending onto the political agenda. The leverage the initiative has gained through sensitising diverse actors, who have carried the message further, is an important element.

The process of establishing opportunities for dialogue and even collaboration with the government has been partially a result of the change in the overall political landscape of the country. In this sense, the opportunities that arise when a government talks about far-reaching changes are invaluable when one is embarking on proposals that question what has been done before. Gender-sensitive budgets question predominant paradigms. These are often under revision, at least to some extent, when major changes in government occur.

The opportunities for collaboration, and the position in which the Mexican initiative finds itself currently, point to the success of its initial phases. They also point to a whole new array of challenges and unresolved questions. It is here that some of the major challenges for gender budget initiatives worldwide come into the picture. What has to be done once it really starts happening? What kind of capacities have to be developed in order to have the strengths needed – both in terms of skills and human resources – to turn the commitment and willingness of government agencies into concrete action?

Despite the involvement of broad-based networks, advocacy groups and grassroots organisations in some of the state-based projects, one of the challenges faced by the Mexican gender budget initiative is that participation is still very limited. Because of the technical skills required, it has been extremely difficult to create messages that

empower women who are not engaged in the process so as to enhance the role they play within their environments.

Another challenge is the ability to make a process like the one the Mexican initiative has been following in health replicable in other sectors. Is it possible to develop the same leverage for education, labour and housing issues, for example? One perspective would make us believe that by opening up this process, getting fully engaged in it and achieving concrete results, the need for equitable and gender-sensitive spending will be 'modelled', and thus feasible to replicate. Another perspective points to the possibility that in order to develop the same leverage regarding other issues, a similar step-by-step, long-term process will have to be followed.

Lastly, the achievement of a certain level of awareness regarding the topic, as well as the commitment and willingness of particular sectors, points only to a halfway success, namely, highlighting an unfulfilled need. The other half involves actually implementing a gender-sensitive budget, through the development of strategies that might require a different combination of public awareness and technical capacities. In this sense, the differences between knowing the path and walking the path are still to be explored.

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