

MOROCCO: THE EVALUATION OF PUBLIC POLICIES – THE CASE OF GENDER-RESPONSIVE BUDGETING

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INTRODUCTION

The Moroccan Gender-responsive Budgeting (GRB) experience is part of a global logic that seeks to integrate principles of universal human rights within legal, institutional and governance frameworks. The principles of equity and equality—as related to efficiency and performance objectives—were important factors in the 2002 introduction of gender-sensitive budget reforms. This approach is, moreover, a significant asset to evaluating public policies from a gender point of view and the expected impacts on targeted populations with significantly different needs.

The onset of this process, and the progress made by considering gender equality in the design and evaluation of public policies, is largely motivated by the context of the country's democratization. One of the founding repositories of GRB is in the constitutional progress seen under the experience of democratic transition initiated in 1998, itself based on the constitution of 1996, which is characterized by its preamble's introduction of the universal acceptance of human rights. This process experienced increased impetus by the 2011 adoption of the new constitution that pronounced the equality of men and women in terms of rights (civil, political, economic and cultural).

At the operational level, the pragmatic and progressive approach followed since 2002 to integrate gender dimensions into budgetary planning has enabled Morocco to develop analytical instruments based on dedicated and strengthened budget guides. These guides are reinforced by a set of gender-sensitive synthetic indicators that strengthen public policy monitoring and evaluation mechanisms.

EVALUATION OF PUBLIC POLICIES: APPROACH AND METHODOLOGY

Approach

A public policy corresponds to a choice of values being implemented to achieve a goal defined by the political power. It is then defined through the objectives that are assigned to it, the means allocated to the achievement of these objectives, the expected results and the nature of the policy's impacts on the target population.

The evaluation of public policies is based on a comparison between the achievements and the initial objectives assigned to public intervention, taking into consideration the intervention's logic (normative dimension). This has the object of making the public action evolve or defining new policies that are more effective and relevant (instrumental dimension).

Evaluating a policy or public action assesses its effectiveness by comparing its results to the objectives assigned to it and the means put in place for it through the design of performance indicators. Therefore, it is an essential tool for decision-making processes.

Methodology

The evaluation of public policies is classified into three stages:

Stage 1: The first stage aims at establishing a reference point that precisely defines the outlines of the policy to be evaluated, identifies the purpose and nature of the evaluation to be carried out, defines of the assumptions of the evaluation, delineates standards and benchmarks for the evaluation, and reconstructs the programme's or measure's logic of intervention.

Stage 2: The second stage comprises data collection and analysis and, through the development of tools and protocols for data collection (quantitative and qualitative), processes information and designs performance indicators.

Stage 3: Taking into account the assessment's objectives established during the first stage and the indicators developed on the basis of the data collected and processed, the third stage develops a value judgement on the actions and formulates and disseminates the evaluation's conclusions and recommendations.

GENDER-RESPONSIVE BUDGETING

Context of gender-responsive budgeting

Awareness in Morocco of the importance of integrating gender dimensions into public policy is the result of a social democratic movement where women's contributions were decisive. The advent of political alternation accelerated this process by offering opportunities to express demands for change in terms of equity and equality under the programme of the government and through the establishment of committees dedicated to legal, institutional and public policy reforms. These efforts led to the progress in democratic processes that took place in Morocco (e.g. new family and nationality code, the code on public freedoms). This process was completed in April 2011, with the unrestricted acceptance of the Convention on the Elimination of all Forms of Discrimination against Women.

The initiative for integrating gender into the budgetary programming benefited from an

environment marked by the commitment of Morocco to the achievement of the Millennium Development Goals, the establishment of the National Initiative for Human Development, the adoption of proportional representation and the national list in parliament, the adoption of the national strategy and plan of action for gender equity and equality in policy approaches and development programmes, the adoption of the Agenda for the Gender Equality 2011–2015 and the adoption of the new constitution, which secured equal human rights for women (civil, political, economic and cultural).

The concept of gender-responsive budgeting and the key gender dimension in budget considerations

GRB takes into account the execution and evaluation of public policy, social relationships, preoccupations and the differentiated concerns and interests of women, men, girls and boys in society and the family. Considering gender equality in budget programming processes aims to improve budgetary resource allocations by ensuring gender equity and improving public policies' effectiveness and coherence. To do this, the tools developed by GRB include the introduction of fairness of gender in performance indicators, which is a step toward accountability and public transparency.

The GRB process was initially faced with an absence of methodological and design references at the national and international levels. A conceptual and instrumental reformulation was necessary, which entailed enrichment from the information standpoint; a mandatory step for the success of the Moroccan experience.

The 2002 launch of budget reform oriented towards performance, which is fully consistent with the principles of the GRB, established 'the Royal Road' for integrating gender into the budgetary programming process.

To materialize this new approach, the Ministry of Economy and Finance (with the support of The World Bank) conducted a 2002 methodological feasibility study of budgetary accounts of gender and infants. The study produced appropriate instruments for GRB, and was followed in 2003 by the Reinforcement of Capacity Building in terms of Gender-responsive Budgets project, in partnership with UN Women. In addition, the 2007 circular from the prime minister called for integrating the gender approach into all policies and development programmes. Similarly, directives by the prime minister accompanied the Project of Law on Finance in 2007 and 2008, recommending the consideration of the gender dimension in all public programmes.

GENDER REPORT: TOOL FOR THE EVALUATION OF PUBLIC POLICY FROM THE GENDER PERSPECTIVE

The national-level adoption of GRB was reinforced by the preparation of the 'Gender Report', which, since 2005, accompanies the Finance Act. This report is a tool of public policy evaluation that adjusts to the differentiated needs of the target population. By analysing gender in public policies and budgets and their impact on the population, the 'Gender Report' reinforces the accountability of commitments made by the Moroccan Government on gender equality and human development. The 'Gender Report' also focuses on policy successes and gaps in terms of the needs of women and men, thus enlightening public decision-making processes.

The preparation process of the 'Gender Report' has experienced several evolutionary phases, following the phases of the GRB programme:

The first phase of GRB implementation (2003–2004) consisted of awareness programmes and capacity-building through the organization of workshops and training sessions for those responsible for planning and budgetary programming at the level of steering ministerial department programmes (e.g. health, education, agriculture and justice), parliamentarians and non-governmental organizations. The first phase also included the development of tools and a methodology of work ('GRB Manual' and the 'Guide On Budget Reform').

The second phase of GRB implementation (2005–2008) was marked by the 2005 development of the first edition of the 'Gender Report' accompanying the Financial Law (institutionalized since 2006). The process of preparing the Report is progressive (the number of departments involved in the analysis continues to increase), participatory (ministerial department partners contribute effectively to the drafting of the 'Gender Report') and iterative (the content of the report is updated and enriched each year).

During this period, the 'Gender Report' development process evolved considerably: from 2005 to 2007, the number of departments involved in the 'Gender Report' went from 4 to 17. The policies analysed were evaluated according to an analytical framework based on a gender analysis of the situation, an analysis of public priorities, programmes and projects implemented and a gender budget analysis. The analysed departments were divided by areas of functional activity (e.g. institutional, basic infrastructure, empowerment and capacity-building), strengthening of opportunities and intersectoral area of activity.

While processes to conduct public policy evaluations were being refined, a comprehensive collection of statistics on gender in Morocco was published in 2007. It contained available data in the field of statistics disaggregated according to gender, which constituted an analysis tool enabling identification of priority dimensions on which public action should focus in order to improve the conditions of women and to ensure greater equity in public action.

Since 2008, the 'Gender Report' has had close to 21 departments. An analysis of the performance indicators of the operating and investment budgets has been integrated through the use of reports covering the indicators of calculated objectives. The indicators considered relevant are then accompanied by proposals to make them gender-sensitive in order to better understand the impacts of public policy on target populations.

The third phase of the GRB programme (2009 to 2012) coincides with a new level of improvement in the analytical approaches taken at the level of the 'Gender Report'.

From 2009 to 2011, a cross-sectorial analysis following the human rights approach was integrated into the 'Gender Report'. It was a choice dictated by the national context marked by the need for consistency in the different sectorial strategies implemented and by the reform of the organic law relating to the Finance Act that privileges the concept of missions and programmes in budget allocation.

This approach is based on an analysis of the progress made by Morocco in the various sectors in light of the standards contained in the body of international human rights instruments. Particular interest is given to identified deficits and social groups that are excluded or marginalized in order to make adjustments to the level of policies and programmes. This

analytical approach is based on the principle that all policies and development programmes are aimed at respecting human rights as defined in the 'Universal Declaration of Human Rights' and in other international human rights instruments (e.g. the 'International Covenant on Civil and Political Rights' and the 'International Covenant on Economic, Social and Cultural Rights').

The new approach, design and philosophy adopted at the level of the 'Gender Report' coincide with the great institutional change the country has experienced through the new constitution. It is pleasing to see this consistency of approach with the place that has been reserved by the new constitution to the issues of equality and equity not only in its preamble, but also in several articles that recognize the rights and institutionalize ways to implement them.

In applying the new approach, the 26 sectorial departments that were analysed are grouped into three thematic axes (following the declination of the generations of human rights):

- **Equitable access to civil and political rights:** Justice, social development, Directorate General of Local Communities, modernization of the public sector, economy and finance, foreign trade, foreign affairs and cooperation and communications;
- **Equitable access to social rights:** INDH, water, energy, habitat, equipment and transportation, health, national education and literacy, professional training and youth; and
- **Equitable access to economic rights:** Employment, agriculture, fishing, trade and industry, tourism, crafts and social economy.

SUCCESSFUL EXAMPLE OF INTEGRATING GENDER-RESPONSIVE BUDGETING: THE DEPARTMENT OF LITERACY AND INFORMAL EDUCATION

Within the framework of the GRB programme, the Literacy and Informal Education Department received specific support to integrate gender concerns into its budgetary programming. In this respect, the Department has implemented a set of actions adapted to its strategic objectives as defined in its emergency programme (2008–2012), which selected the goal of reducing the illiteracy rate by 20 percent by 2015 in accord with the Millennium Development Goals.

In applying the new performance-based budget approach, the Department of Literacy and Informal Education adopted a gender-sensitive set of objective indicators. These include a series of gender-sensitive indicators, such as sex-disaggregated data on the number of new enrolments, illiteracy rates and an annually reviewed illiteracy and school dropout map (per the Regional Academy of Education and Training and by delegation).

PROSPECTS

Future prospects of GRB in Morocco remain favourable in light of the provisions made by the new constitution, which will widely contribute to the institutionalization of gender mainstreaming through a responsible entity for gender equality. Furthermore, the organic law relating to the Finance Act (under validation) reform project will allow Morocco to permanently record the integration of the gender dimension in budget development, execution and monitoring.

Nevertheless, the expected results in terms of performance and impacts covered under the needs of differentiated components of the target population will remain dependent on several initiatives, such as developing convergence and coherence for public policies; strengthening ministries' institutional capacities to develop gender-sensitive performance indicators; coordinating non-governmental organizations in the process; making further refinements to the statistical system in order to establish gender data and territorial indicators; developing institutional communications on the subject (e.g. designing a knowledge management system); establishing a platform of exchange on good international practices; and developing partnerships at a regional level—e.g. the Maghreb and the Euro-Mediterranean zone through the creation of a Regional Centre of Excellence dedicated to a gender approach in a general manner and to a gender-responsive budget more specifically.