

"WE ALL HAVE OUR CROSSES TO BEAR..."

GENDER & GENDER BUDGETING

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Basic Concepts of Gender, Budget and Gender Budgeting



. CONCEPT OF GENDER

Gender is the culturally and socially constructed roles, responsibilities, privileges, relations and expectations of women and men, boys and girls.

Because these are socially constructed, they can change over time and differ from one place to another. Sex is the biological make-up of male and female people.

it is what we are born with, and does not change over time, nor differs from place to place.



GENDER RELATED CONCEPTS

Gender Roles

Gender Bias

Gender Equity &
Equality

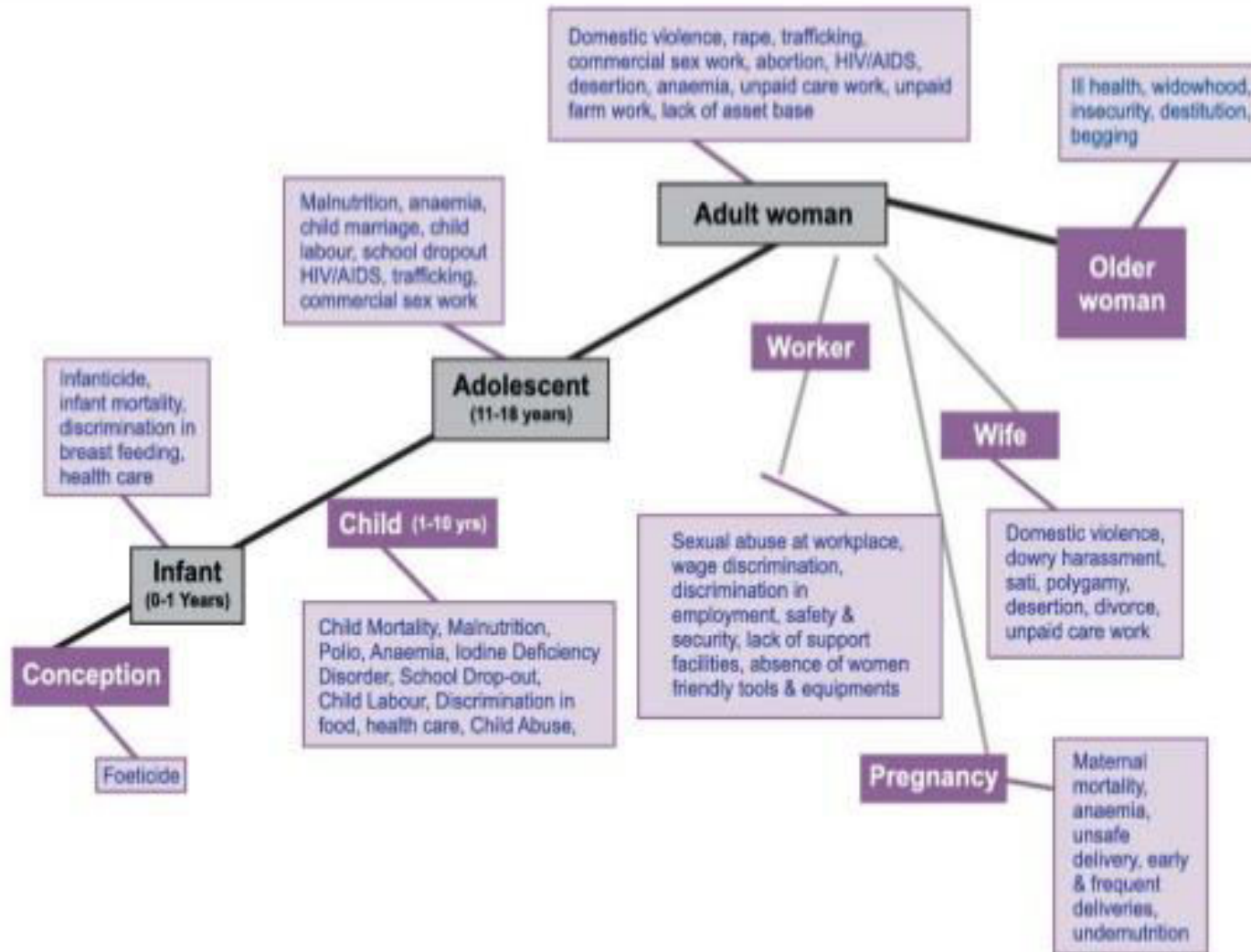
Gender Blind

Gender
Stereotyping

Gender Gap

Gender Discrimination

Discrimination Through The Life Cycle of Girls & Women



WHAT IS A BUDGET?

A Budget is the sum of money allocated for a particular purpose and the summary of intended expenditures along with proposals for how to meet them.

It expresses strategic plans of business units, organizations, activities or events in measurable terms. In simple words, Budget is an estimation of income and expenditure for a set period of time



GENDER BUDGETING

“Gender budgeting is an application of gender mainstreaming in the budgetary process. It means a gender based assessment of budgets, incorporating a gender perspective at all levels of the budgetary process and reconstructing revenues and expenditures in order to promote gender equality.”

Gender Budget is not:

A separate budget

About spending the same on women and men

Just about assessing the programmes targeted specifically at women and girls

BACKGROUND AND DEVELOPMENT OF GENDER BUDGETING

Gender budgeting came into being in the international context of economic globalization.

Countries of the Commonwealth were the first to take steps towards the implementation of gender budgeting.



GENDER BUDGETING IN INDIA -EVOLUTION

Seventh Plan(1987-1992): 27 major women specific schemes identified for monitoring to assess quantum of funds/ benefits flowing to women.

Eighth plan : the highlighted need to ensure a definite flow off funds from general developmental sectors to women.

Ninth Plan: Women's Component Plan(WCP)-30% off funds were sought to ear-marked in all women related sectors.

Tenth Plan: Aims at tying up concepts of WCP & Gender Budgeting

Eleventh Plan states that : ' gender equity requires adequate provisions to be made in policies and schemes across Ministries and Departments. It also entails strict adherence to Gender Budgeting across the board.'

A Gender Budget Statement was introduced in the Union Budget in 2005-06.

KEY POINTS OF GENDER BUDGETING

In Gender Budgeting, “Gender” means women and her empowerment.

- **It is not an accounting exercise.**
- **It is an ongoing process of keeping gender perspective in policy/programme formulation, implementation and review.**

A tool to translate gender commitments into budgetary commitments.

To extend the gender based review to all levels of governance- Centre, State, District, Town and villages. Public sector units, autonomous bodies and other beneficiaries of public expenditure are included.

NEED OF GENDER BUDGETING

- **Nearly two third of the illiterates in the world are women**
- **Women represent 48% of total population in country.**
- **Women are under represented in decision making in both government and business sector.**
- **Women face disparities in access to and control over service and resources.**
- **Women receive less pay than men for the same work in various sectors.**
- **Women also continue to do most of unpaid work of bearing, rearing and caring for children and other citizens.**

ADVANTAGES OF GENDER BUDGETING

- Gender budgeting creates greater transparency regarding the criteria that form the basis for budget related political decisions.
- GB facilitates greater accuracy and sustainability because available funds are more precisely tailored to the real needs of the different social groups.
- GB is a procedure that makes discriminating implications of financially effective decisions visible and that enables a gender equitable restructuring of resource related decisions.
- GB is an option to put gender equality related goals into practices, including in times of bigger budgetary margins.

WHY DOES GENDER BUDGET FOCUS ON WOMEN...?

Nearly two third of the illiterates in the world are women

In the developing countries maternal mortality continues to be a leading cause of death for women of reproductive age

Women are under represented in decision making in both government and business sector

Women economic work continues to be very different in nature from men 's. women are engaged in less formal, lower status type of work and continues to receive less pay than men for the same work

Women also continue to do most of unpaid work of bearing, rearing and caring for children and other citizens




GENDER AUDITING

Gender Auditing is part of the Gender Budgeting process.

Gender auditing is the process that is conducted after the budget has been adopted and implemented.


It is the process of reviewing financial outlays – looking at trends over time, percentage shares etc; analyzing and assessing systems actually put in place, processes adopted, outcomes and impacts of budgetary outlays.



ACTORS IN GENDER BUDGETING

- 1. Ministry of women and child development (nodal ministry at central level)**
 - 2. Ministry of finance(at central and state level)**
 - 3. The planning department or planning commission (at central and state level)**
 - 4. Sectoral minister**
 - 5. Researchers and economists**
 - 6. Statisticians**
 - 7. . Civil society organizations etc**
- 

_STEPS IN GENDER BUDGETING

- 1. Situation analysis of gender in given sector**
 - 2. . Assessment of gender-based policies and programmes**
 - 3. . Assessment of adequacy of budget allocation**
 - 4. Monitoring whether the money was spent as per objectives laid and planned**
 - 5. . Assessment of impact of policy**
- 

Tools and Techniques of Gender Budgeting – Understanding Gender Budgeting cycle



HOW IT BEGAN

Post-Independence, planned development adopted - framing of the five year plans, the first major step taken in the direction of welfare state.

The First FYP (1951–56) contemplated welfare measures for women, e.g. – - Central Social Welfare Board (CSWB) was established in 1953 - Mahila Mandals were organised and - Community Development programme launched as a pilot in 1952

The Third (1961-66), Fourth (1969-74) and other interim plans accorded high priority to women's education and introduced measures to improve material and child health services. Maternity Benefit Act, 1961, The Medical Termination Of Pregnancy Act, 1971, The Dowry Prohibition Act, 1961

CHALLENGES

- **Women are trapped in low wage, unskilled jobs**
- **Training and livelihood enhancement opportunities remain gendered, reinforcing gender stereotypes (Sewing machines)**
- **Invisibility of the contributions made by women to productive sectors and infrastructure creation and maintenance**
- **Insufficient (and inequitable) investment in enhancing women's productive capacities.**

On paper, lot of programs are in operation which claims the involvement of women at grassroots;

however in practice it is not so.

Evolve a continuous monitoring system to see the actual involvement of wome

GENDER RESPONSIVE BUDGETING

- Gender Responsive Budgeting (GRB) is a process that entails incorporating a gender perspective at various stages - planning/ policy/ programme formulation, assessment of needs of target groups, allocation of resources, implementation, impact assessment, reprioritization of resources.
- Gender Responsive Budget and Gender Mainstreaming are outcomes of the process

GENDER RESPONSIVE BUDGETING: TWO APPROACHES

Approach 1 –

- The establishment of one or more gender equality objective(s)
- design of appropriate activities
- identification of budget
- allocation(s) to achieve the objective(s).

the focus is on the status of gender equality in the sector and the identification of areas for improvement. For example: what are the gender imbalances in education? Are more girls than boys progressing? Are boys doing better at science? In relation to sport, the participation rates of males and females could be a focus.

This sectoral analysis will lead to an understanding of how gender inequality is manifest and in turn to the identification of measures and resources to improve the situation.

Approach 2 - Systematic examination of all budgetary items with the objective of making any necessary changes to produce more gender equitable outcomes.

The focus is on the existing activities / programs and their associated budget lines. For each budgetary activity the purpose of the analysis is to discover the differential impact on men and on women; to determine relevance / there potential and to redesign the activity so as to redress the imbalance and so promote gender equality.

IMPORTANCE OF GRB

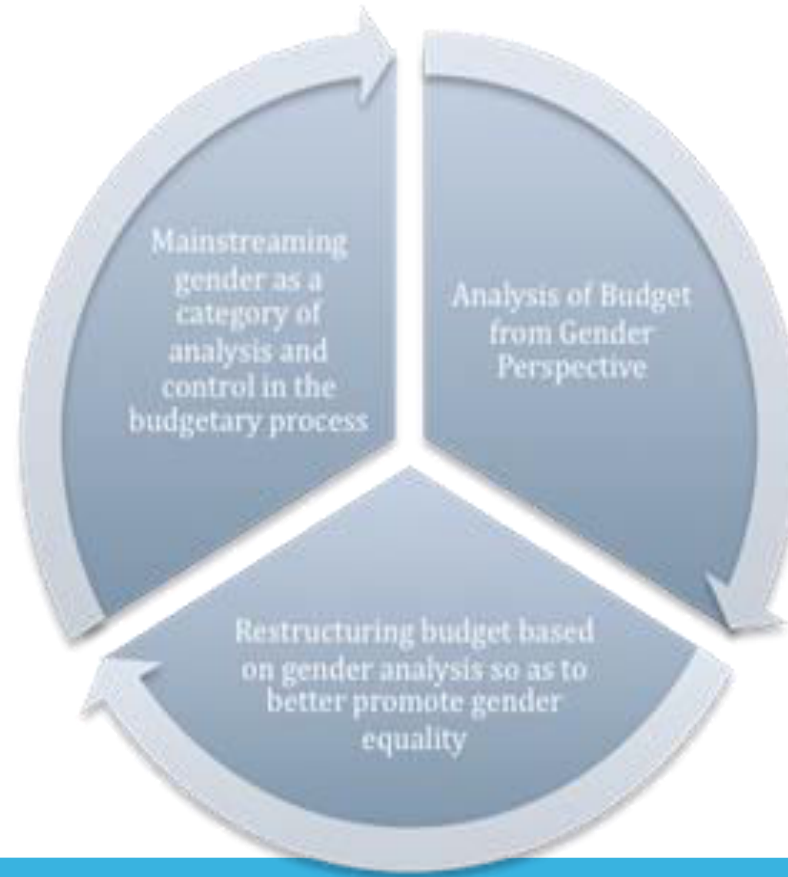
- GRB is important Because by monitoring inputs, activities, outputs, and outcomes of budgets the following can be achieved:
 - Improved **transparency** and **accountability**
 - Improved **efficiency** and addressal of discrimination,
 - More **effective use of public funds** and reduced corruption
 - Gender sensitive improved policies that contributes to economic growth
 - Strengthens citizen advocacy and monitoring

STRATEGIES AND TOOLS OF GRB

- Following issues must be kept in mind before deciding upon the entry points for a given situation
 - Actors/Key Players/Stakeholders and their roles and related activities
 - Scope of Gender Budgeting
 - Stages of Gender Budgeting – at the budget preparation stage, when the budget is tabled, at the budget implementation stage and post-implementation stage

Basic Pre-requisites for GRB – Understanding of Gender and GRB and Gender relevant data-base

THE THREE STAGES OF GENDER RESPONSIVE BUDGETING



STAGE 1 – ANALYSIS OF BUDGET FROM GENDER PERSPECTIVE

Stage 1 is the - first step;

The first instance gender sensitive analysis is useful to demonstrate that men and women are impacted by budgets and that they are impacted differently

while economists and finance officials deal in monetized variables and financial aggregates, the end product of budgets is services, transfers and salaries targeted to *people*.

The first level of analysis is to produce a sex-disaggregated report of end users, or recipients of budget programs.

STAGE 2: REFORMULATION OF SPENDING LINES SO AS TO PRODUCE BETTER GENDER EQUALITY OUTCOMES.

- Gender equality strategy in budget decisions stands a better chance of being resourced and implemented with gender sensitive analysis .**
- Any unintentional gender biases can be revealed and mitigated.**
- If analysis reveals, budget resources have not been distributed in a gender equitable way, a response from the budget is required to redress the inequity.**
- realignment is required Where ever the distribution of budget resources does not match the government's gender equality policies.**
- In some instances restructuring may mean a positive action measure, a temporary additional spending line specifically targeted at an identified problem.**

STAGE 3: WORKING SYSTEMATICALLY TO EMBED GENDER WITHIN ALL BUDGETARY PROCESSES.

This is essentially a mainstreaming process with the objective to integrate gender as a category of analysis in the formulation and the execution of the budget.

Gender budgeting is not just about the content of budgets; it is also about the processes involved in budget-making. It is about how budget decisions are made, about the assumptions informing budgets; it is about who makes decisions and who influences decisions and it is about who is denied influence. Essentially, public expenditure management is a political process and not simply a technocratic one. So that while understanding the technicalities of budget formulation and execution is important, understanding the political influences on the system is also important. In many gender budget initiatives, the role of civil society to hold government accountable has played a significant part in bringing political influence to bear.

Elson, Diane and Andy Norton. 2002. What's Behind the Budget? Overseas Development Institute, London

GENDER AUDIT

A gender audit of the budget involves examining how each tax or item of expenditure differentially impacts men and women

A **tool** to assess the extent of gender mainstreaming accomplished

The basic assumption of gender audits is that public policy impacts differently on men and women. The purpose of gender audits is to lead to changes in public policy that contribute to an increase in gender equality.

Why Gender Auditing?

- It is **part of the budget cycle**
- No. of Policy and Programmatic commitments supporting gender equality by various Ministries and Departments – **GA is the only way to ascertain whether or not the national budget benefits women and men equally**

It examines whether & at what level GB initiatives have been adopted in the planning, implementation and review of the policies and budgetary allocations

It raises women's awareness of economic issues which impacts public opinion and thereby national budgets

Women's participation in gender auditing leads at local levels to a more efficient use of the resources committed to areas relevant to women

DIMENSIONS OF GENDER AUDIT

PROGRAMMATIC DIMENSIONS

1. Situational Analysis
2. Policy Analysis including program design, guidelines and framework of implementation
3. Budgetary Allocations & Expenditure
4. Monitoring
5. Impact Analysis / Evaluation

ORGANISATIONAL DIMENSIONS

1. Organisational Culture – (Mechanisms/Practices/Attitudes)
2. Gender Policy & Staffing
3. Resources spent on gender mainstreaming e.g. Capacity Building
4. Gender sensitive products and services (infrastructure)
5. Advocacy, and communication strategy

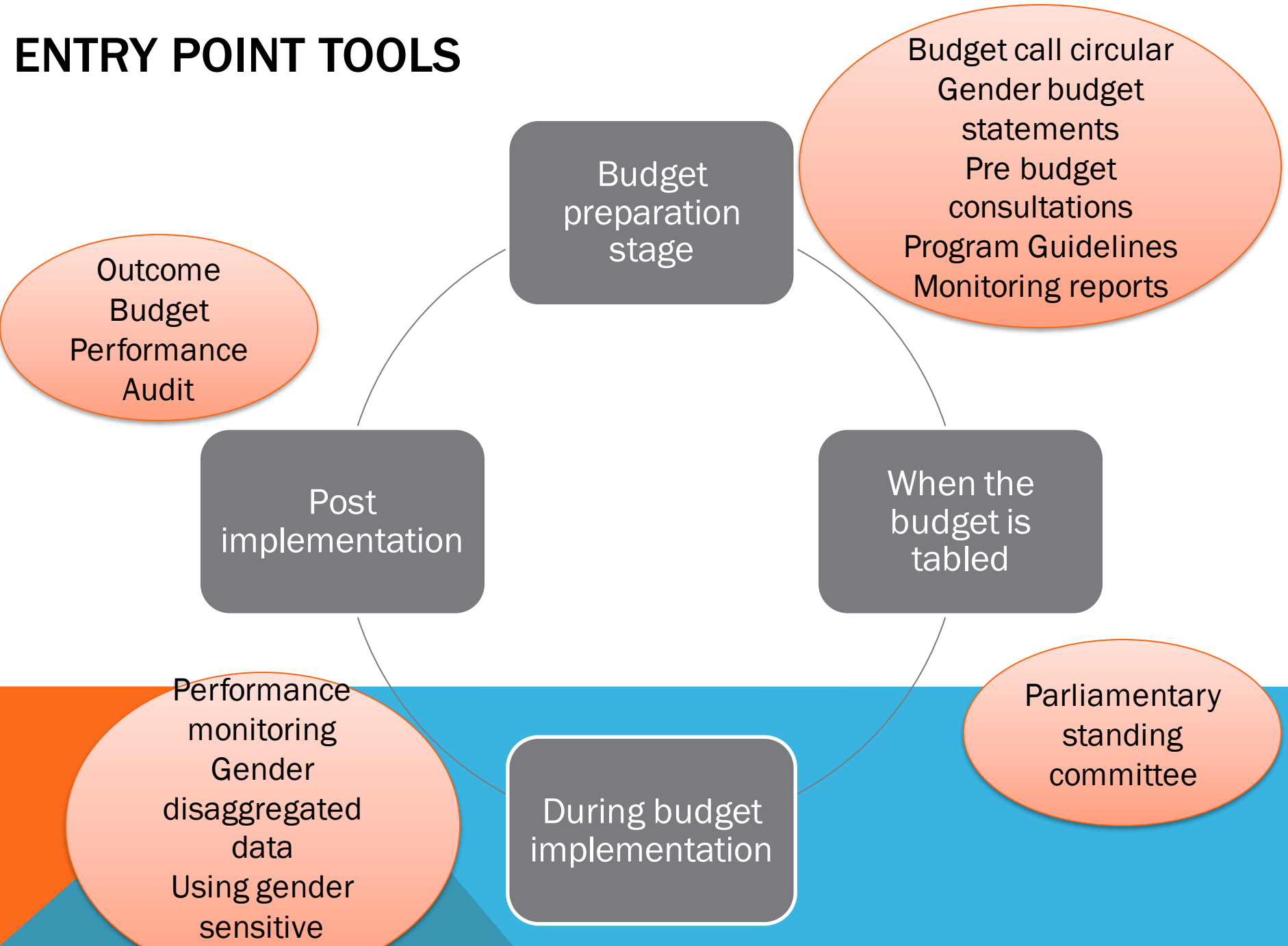
Budget Cycle



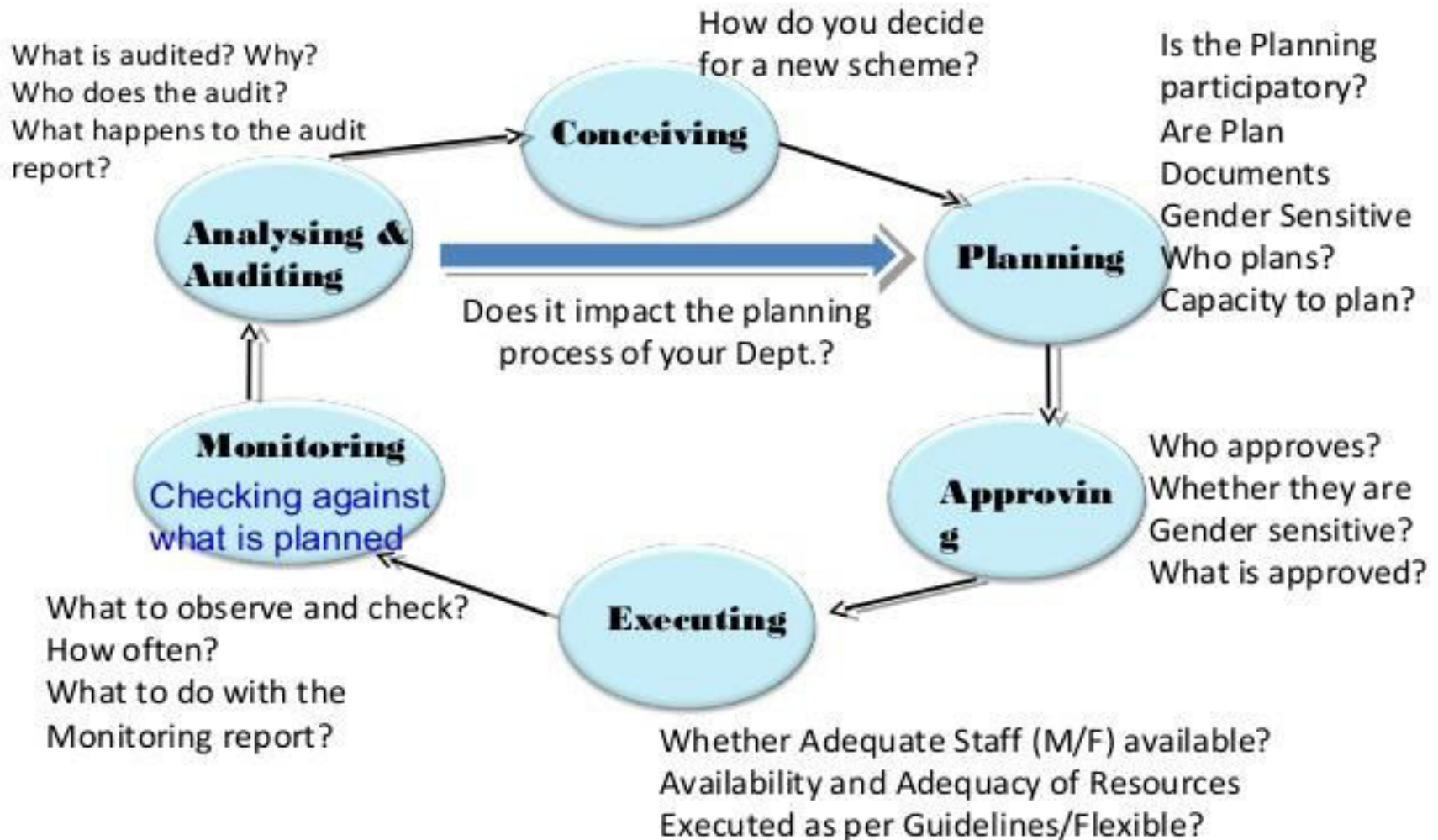
* Proposed Additions to the Cycle



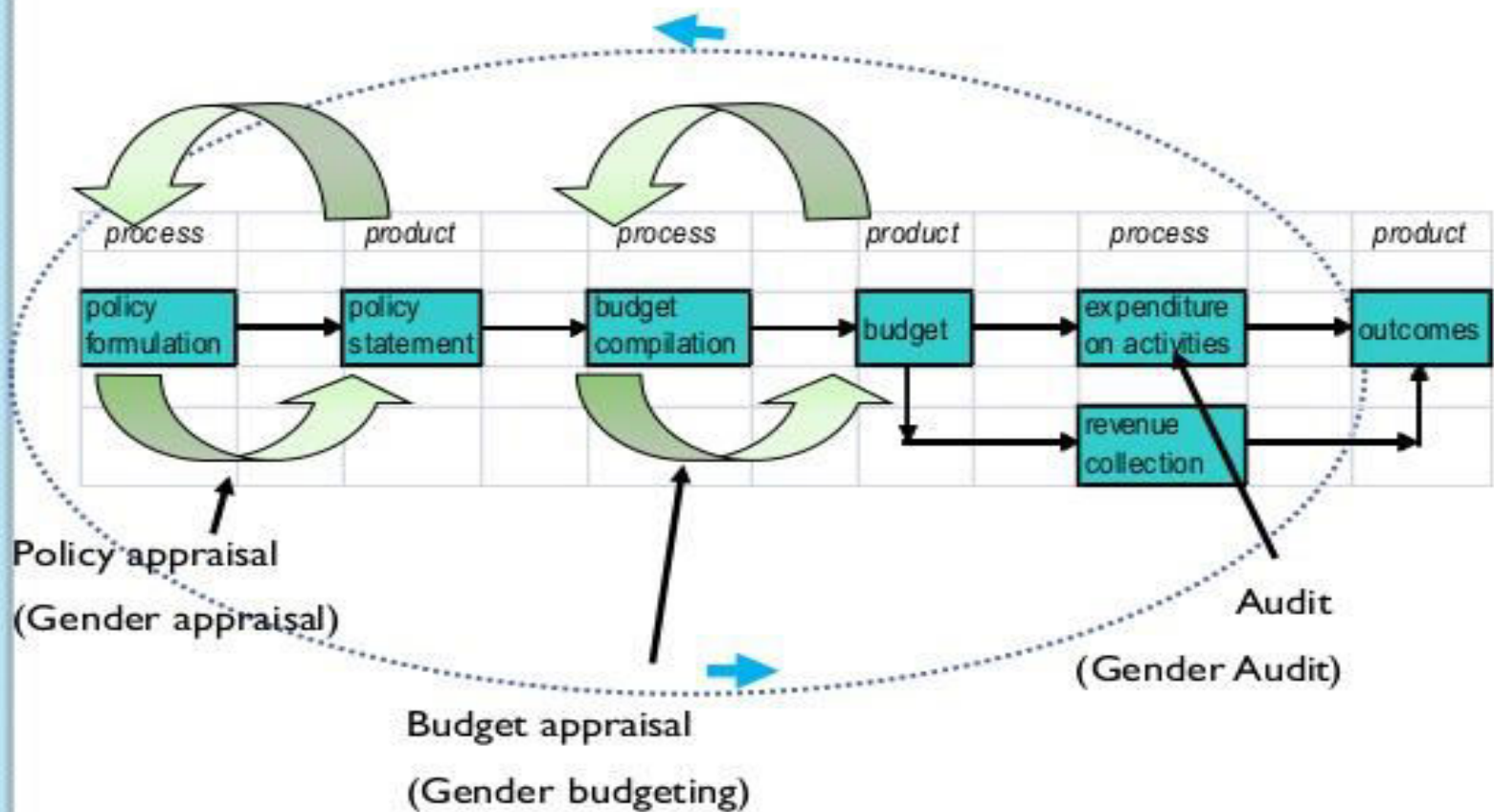
ENTRY POINT TOOLS



Processes of GB



GRB - From Policy to Outcomes



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Understanding Five Step Frame Work – Entry Point Tools for Gender Budgeting



FIVE STEP FRAMEWORK.

Debbie Budlender's Five Step Framework

1. Analysis of the situation of women, men, girls and boys in a given sector. **Budget Speak: situational analysis**
2. Assessment of the extent to which policies address the gendered situation. **Budget Speak: Activities**
3. Assessment of whether budget allocations are adequate, in order to implement gender-responsive policies.
• **Budget Speak: Input**
4. Assessment of short-term outputs of expenditure, in order to evaluate how resources are actually spent, and policies and programmes implemented. **Budget Speak: Outputs**
5. Assessment of the long-term outcomes or impact expenditures might have **Budget Speak: Outcomes**

1. ANALYSIS OF THE SITUATION OF WOMEN, MEN GIRLS AND BOYS IN A GIVEN SECTOR.

BUDGET SPEAK: SITUATIONAL
ANALYSIS

2. ASSESSMENT OF THE EXTENT TO WHICH POLICIES ADDRESS THE GENDERED SITUATION.

BUDGET SPEAK: ACTIVITIES

3. ASSESSMENT OF WHETHER BUDGET ALLOCATIONS ARE ADEQUATE, IN ORDER TO IMPLEMENT GENDER-RESPONSIVE POLICIES.

4. ASSESSMENT OF SHORT-TERM OUTPUTS OF EXPENDITURE, IN ORDER TO EVALUATE HOW RESOURCES ARE ACTUALLY SPENT, AND POLICIES AND PROGRAMMES IMPLEMENTED.

BUDGET SPEAK: OUTPUTS

**5. ASSESSMENT OF THE
LONG-TERM OUTCOMES OR
IMPACT EXPENDITURES
MIGHT HAVE.**

BUDGET SPEAK: OUTCOMES

LOOKING AT THE FOLLOWING WITH A GENDER SENSITIVE LENS

1. Situational analysis.

2. Activities

3. Input

4. Output

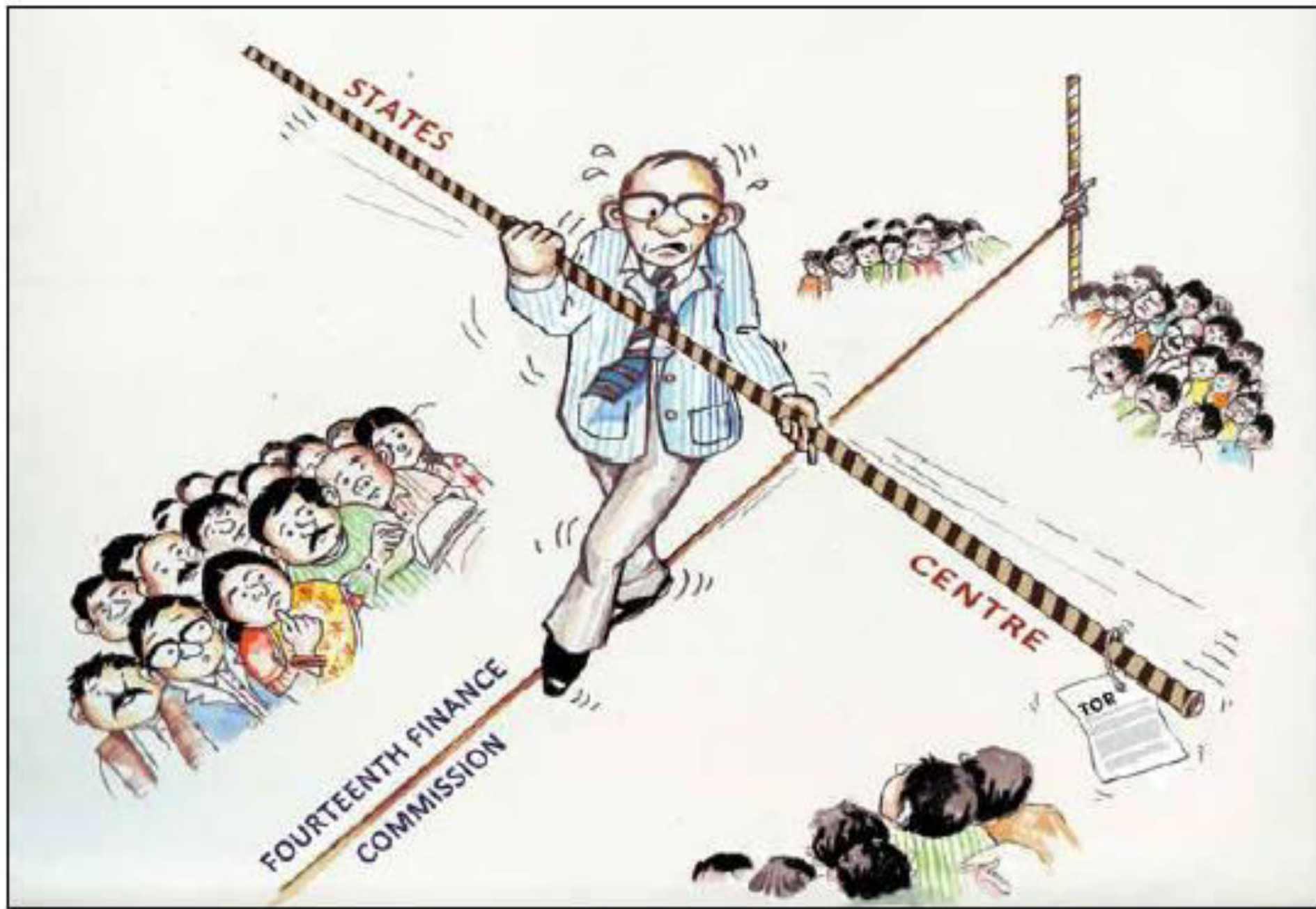
5. outcomes















Prioritise
Social Sectors

Revert to FRBM

Appease
Stock Markets

Continue
Fiscal Stimulus

Budget
2010