

# 2

## Concept and Definition of Gender Budgeting

### GENDER AND SEX

Before discussing Gender Budgeting, we need to understand what gender is, and the difference between gender and sex.

- 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.

(The annex 1 to this chapter explains these and other key gender-related terms.)

Government needs to think about both gender and sex when making policies and allocating budgets to implement the policies. In respect of sex, government needs to ensure that policies and programmes are available and adequately financed to address the different biological needs of women and men, including childbearing for women. In respect of gender, government needs to have a vision of the type of roles, responsibilities, and relationships that it wants to see in the country for women and men, girls and boys, and design, fund and implement policies and programmes to move towards this goal.

### WHAT ARE GENDER-RESPONSIVE BUDGETS AND GENDER BUDGETS?

A gender-responsive budget is a budget that acknowledges the gender patterns in society and allocates money to implement policies and programmes that will change these patterns in a way that moves towards a more gender equal society. Gender budget initiatives are exercises that aim to move the country in the direction of a gender-responsive budget.

Gender budget initiatives are known by a range of different names. They have, for example, also been referred to as 'women's budgets', 'gender-sensitive budgets', and 'applied gender budget analysis'. This handbook uses the term Gender Budgeting (GB) to refer to all these initiatives.

### WHY DO GENDER BUDGETING?

The budget is the most important policy instrument of government because no other policy will work without money. As such, the government budget can be a powerful tool in transforming our country.

### WHY IS GENDER BUDGETING NECESSARY?

The achievement of human development is heavily dependent on the development and empowerment

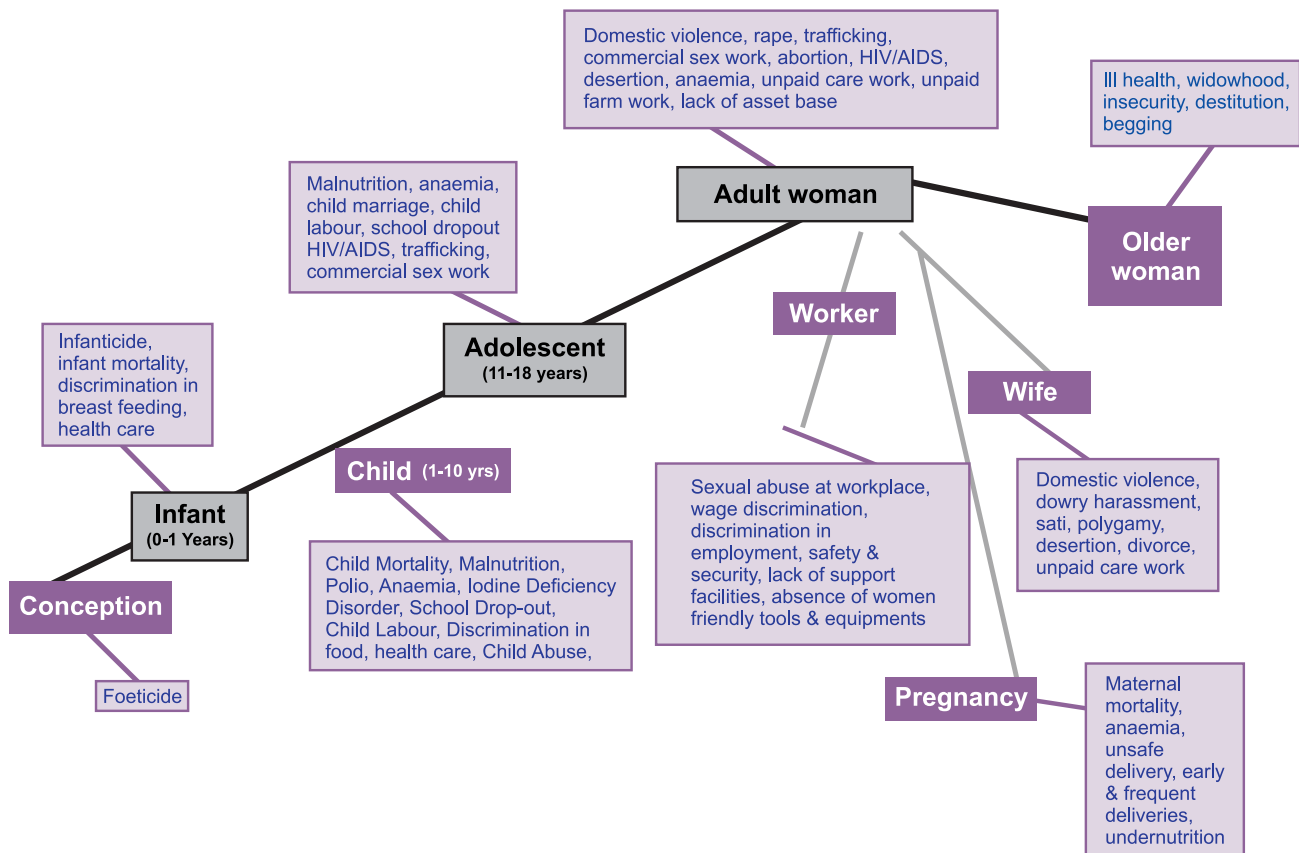
of the 496 million women and girls who, according to the 2001 census, account for 48 percent of the total population of the country. These women and girls not only comprise a large part of the valuable human resources of the country; they are also individuals in their own right and their socio-economic development sets the foundation for sustainable growth of the economy and society as a whole. In addition, the Constitution of India has mandated equality for every citizen of the country as a fundamental right.

Nevertheless, the reality is that women in India continue to face disparities in access to and control over resources. These disparities are reflected in indicators of health, nutrition, literacy, educational attainments, skill levels, occupational status among

others. The poor status and value attached to women is also reflected in the fact that the female sex ratio for the 0-6 age group declined from an already low 945 in 1991 to 927 in 2001, implying that millions of girls went missing in just a decade.

There are a number of gender-specific barriers which prevent women and girls from gaining access to their rightful share in the flow of public goods and services. Unless these barriers are addressed in the planning and development process, the fruits of economic growth are likely to completely bypass a significant section of the country's population. This, in turn, does not augur well for the future growth of the economy. The chart below illustrates some of the forms of discrimination faced by girls and women through the life cycle.

### DISCRIMINATION THROUGH THE LIFE CYCLE OF GIRLS AND WOMEN



One of the tools that can be used to promote women's equality and empowerment is gender-responsive budgeting, or Gender Budgeting as it is more commonly known in India. This is not the only tool that can and must be used if equality and empowerment are to be realised. Gender Budgeting is, however, an essential tool because, unless sufficient money is allocated to implement all the other tools and strategies, they will not be effective.

Gender Budgeting is based on the modern idea that budgeting is not simply an accounting or bookkeeping exercise. Instead, budgeting is a key part of the planning and implementation process. Thus budgets should follow policies rather than policies being determined by budgets. And among the policies that budgets should follow, is Government of India's commitment to promoting gender equality.

Gender Budgeting serves varied purposes. These include, among others:

- identifying the felt needs of women and reprioritising and/or increasing expenditure to meet these needs;
- supporting gender mainstreaming in macroeconomics;
- strengthening civil society participation in economic policymaking;
- enhancing the linkages between economic and social policy outcomes;
- tracking public expenditure against gender and development policy commitments; and
- contributing to the attainment of the Millennium Development Goals (MDGs).

Gender Budgeting can help to improve economic governance and financial management. It can provide feedback to government on whether it is meeting the needs of different groups of women and men, girls and boys. These different groups might be rich and poor women and men, those from different castes and tribes, those from rural and urban areas, young vs old, and so on.

## GENDER BUDGETING AND INDIA'S INTERNATIONAL COMMITMENTS

During the last decade, a number of international meetings have been convened that have the potential for transforming the reality of women's lives. At many of these meetings government, including Government of India, have committed to taking action to improve the situation of women. The following are among the international commitments to which Government of India is party:

- The Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW), which Government of India signed in 1980.
- The World Conference on Human Rights in Vienna (1993) asserted that women's rights are human rights.
- The International Conference on Population and Development (ICPD) in Cairo (1994) placed women's rights and health at the centre of population and development strategies.
- At the Fourth World Conference of Women in Beijing (1995), governments declared their determination "to advance the goals of equality, development and peace for all women everywhere in the interest of all humanity".
- In the 1995 Commonwealth Plan of Action on Gender and Development governments declared their vision of a world "in which women and men have equal rights and opportunities in all stages of their lives".

## WHO SHOULD BE INVOLVED IN GENDER BUDGETING?

This handbook is intended primarily for Government of India officials. Gender Budgeting can, however, also be done and used by people outside government, in women's organisations, non-governmental organisations, academia, the donor community, the legislature, as well as by ordinary citizens. For those outside government, Gender Budgeting can encourage transparency, accounta-

bility and participation, and facilitate better advocacy. For those both inside and outside government, Gender Budgeting work provides information that allows for better decision-making on how policies and priorities should be revised - and the accompanying resources needed - to achieve the goal of gender equality.

## WHAT GENDER BUDGETING IS & IS NOT

Government budgets and policies are often assumed to affect everyone more or less equally: to serve the public interest and the needs of the general person. This is a myth for two reasons. Firstly, the type and extent of needs differ between people, and so there is no 'general person' even if we look at a single country or state. Secondly, all government budgeting involves prioritisation, because there is never enough money to address all needs fully.

The ideal government budget focuses on those who are least able to provide for themselves. GB thus tends to focus more on the needs of women and girls than those of men and boys, because women and girls are usually at a disadvantage economically and in other ways. But the need for prioritisation also means that GB focuses on the needs of those among the women and girls who are most in need and furthest behind - for example, those who are poor, from scheduled castes and tribes, in rural areas, and so on.

Given differences in needs, Gender Budgeting is not about simply dividing government money 50-50 between men and boys on the one hand, and women and girls on the other. A simple 50-50 division may look equal, but it is often not equitable, or fair, because the needs of women and men and girls and boys may be different. Instead, Gender Budgeting looks at every part of the government budget to assess how it will address the different needs of women and men, girls and boys, and different groups of women and men, girls and boys. For example, in the area of health, male and female people will have similar needs in respect to influenza and malaria. But women will have greater needs than men in terms of reproductive health.

Gender Budgeting initiatives do not seek to create separate budgets to address women's or gender concerns. The overall aim is to ensure that every part of the government budget takes gender differences into account. Special allocations for women and gender are sometimes helpful in addressing specific needs, but they are of limited use if the rest of the budget continues to privilege some citizens above others. Special allocations can thus be regarded as a form of affirmative action that might be necessary to 'kickstart' change when the gender gaps are very large. But Gender Budgeting cannot stop with these special allocations.

## THE SCOPE OF GENDER BUDGETING

Gender Budgeting expands our concept of the economy to include things that are not usually valued in money. In particular, Gender Budgeting recognises the unpaid care economy - the work that mainly women do in bearing, rearing and caring for their families and the people in our society. Gender Budgeting recognises that unless this unpaid care work is done, the economy will not function effectively and people's well-being will be very negatively affected. Government therefore needs to find ways of supporting those who do this unpaid care work, lessening their burden, and ensuring that the work is done well.

Gender Budgeting should, however, not be confined to the 'social' or 'soft' areas such as education, health and welfare. Gender Budgeting is a tool for gender

### The work of a "useless" woman

During a workshop in Rajasthan, we asked a man whether his wife worked. He said with great disdain that she was useless and did nothing. But when we asked the woman how she spent her day, she told us that she woke up at 4 am every morning; milked the cow; gave it fodder; collected firewood and water and cooked for the family before sending her children to school. During the day she often took the animals for grazing or would spend time cutting fodder; look after the elders in the family; feed the children and the rest of family; clean the dishes and finally go to bed after the rest of the household had retired.

mainstreaming in the developmental process as a whole. As such, it needs also to be applied in areas such as agriculture, power, defence, commerce, and information technology where the gender implications may not be immediately apparent. Later chapters give examples of how this can be done.

## GENDER BUDGETING LOOKS AT REVENUE AS WELL AS EXPENDITURE

Gender Budgeting often focuses on budgets for implementing particular programmes, projects and schemes. But it is also important to look at the revenue side of government budgets.

For example, user charges are usually introduced on the grounds that they will increase efficiency and promote accountability; however studies have shown that it is often women, and poor people, who pay the price for this. For example, if user fees are introduced in hospitals, poor men and woman may not go to hospital when they need to, or may go to hospital much later than they should and leave hospital before they should because they cannot afford to stay long enough to recover completely. This puts an additional burden on the woman who has to provide care in addition to coping with her other responsibilities while the household member is recovering.

Charging user fees for government services shifts these services from a public good to being a commodity. Some people argue that user fees will discourage people from using health facilities when it is not necessary and avoid overburdening the system,

resulting in a better service for those who really need it. However those against user fees note that user fees will generate only a very small amount of money and that the effort needed to collect the fees, when compared with the negative impacts that they can have, are not worth it. User fees will be particularly onerous for poor women as they do not generally have money. Exemptions are of limited use as they are usually not well advertised and providers generally make it very difficult for people to get exemption.

## WHY DOES GENDER BUDGETING FOCUS ON WOMEN?

Around the world, Gender Budgeting tends to focus on women because:

- nearly two thirds of the illiterate people in the world are women;
- in 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 sectors, especially at senior levels;
- women's 'economic' work continues to be very different in nature from men's. Women are engaged in less formal, lower status types of work and continue to receive less pay than men for the same work; and
- women also continue to do most of the unpaid work of bearing, rearing and caring for children and other citizens.

### Evidence on the impact of user fees on health services in Africa.

- In Kenya the introduction of a small fee for outpatient visits to a health centre resulted in a 52 % reduction in outpatient visits.
- In Nigeria maternal deaths increased by 56 % and hospital deliveries fell by 46 % after user fees were introduced.

## WOMEN'S NEEDS & CHILDREN'S NEEDS

Some people assume that addressing children's needs automatically implies gender sensitivity. This tendency is aggravated when policy - including the MDGs - puts women's health and child health together in a single category. The tendency can also be encouraged where, as in India, a single Ministry is responsible for both women and children's affairs.

Children are a gender issue and a woman's issue to the extent that women bear the main brunt of caring for children. Women are probably generally more concerned about children's welfare than the average man. Children thus become a gender issue because of woman's reproductive role and their related responsibilities, duties and burdens. However this does not necessarily mean that what is good for children is good for women. Women's own individual rights need to be given due consideration, rather than their being seen only in relation to others. Further, when programmes and projects that promote children's development are implemented, the designers need to consider whether these will add to or reduce the burden on the mothers and other women who care for the children.

## DATA NEEDS FOR GENDER BUDGETING

Good Gender Budgeting relies heavily on data, so that policies, programmes and budgets can be evidence-based rather than based on myths or assumptions. Data are needed at different stages of the budgeting process. Initially, data are needed to describe the situation of women and men, girls and boys. Subsequently, data are needed that reflect delivery of the programmes and projects i.e. how many women and men, girls and boys are reached. Data are also needed to show the impact of the policies and programmes i.e. whether they have made a difference to the situation of the people of the country.

## GENDER-RELEVANT DATA CONSISTS OF TWO TYPES

- Sex-disaggregated data i.e. data that are given separately for males and females to show possible different patterns
- Data on gender issues that affect only one sex e.g. data on maternal mortality, or violence against women.

A lot of the needed data will already be available. For example, government services such as health and

education already collect information on the number of male and female people served, although they may not always publish it - or may not publish it in budget documents. In other cases, government is collecting data but not doing so separately for male and female. Here a small change is needed in the information systems so that there is separate collection and reporting. In yet other cases, data on some important issues are not currently collected. Here additions need to be made to government information systems so that the key data are available for planning and monitoring of programmes, projects and budgets.

## CONCLUSION

There is no single model of Gender Budgeting, and a later chapter will show how other countries have utilised diverse models. Nevertheless, the common theme across all these models is a perspective and approach for gender mainstreaming that asks: "What is the impact of governmental budgets on women and men, girls and boys?"

International experience with Gender Budgeting suggests that, despite its potential contribution to development, initiatives may fall by the wayside if those who are responsible for doing the work do not understand why they are doing it, or feel that the added value is not worth the added work. Government of India's plan is that Gender Budgeting should be institutionalised as part of the standard budget process. Gender Budgeting should be seen as a way of shaping the main government budget, rather than as an add-on. In the early years of doing Gender Budgeting, there will be extra work as government officials learn new skills and methods of analysis, and as the lead agencies - Ministry of Finance and Ministry of Women and Child Development - perfect the methodology and guidelines. After a few years, however, the approach will become a natural and obvious part of good budgeting practice.

## Annex 1

### GENDER CONCEPTS

**Sex:** The biological make-up of men and women, boys and girls - the physical attributes with which we are born.

**Gender:** Culturally and socially constructed roles, responsibilities, privileges, relations and expectations of women, men, boys and girls. Gender is not another word for women. Gender is also **not** another word for sexual difference.

**Gender roles:** The different tasks and responsibilities and expectations that society defines and allocates to men, women, boys and girls. These are not necessarily determined by biological make-up and therefore can change with time and in different situations.

**Gender bias:** An approach that impacts more positively on male than female, or on female than male.

**Gender equitable:** An approach that results in just/fair treatment of women and men, and recognition and appreciation of both women's and men's potential.

**Gender blind:** An approach that does not recognise that there may be differences in situation, needs, feelings, interests etc, of women, men, girls and boys.

**Gender neutral:** An approach to planning that treats women, men, girls and boys as if they were part of one homogeneous group. (Experience has shown that gender neutral planning generally favours the needs of the dominant group.)

**Gender analysis:** The critical examination of issues as they affect women and men, girls and boys. Gender analysis is **not** a way of de-prioritising men. A gender analysis may imply giving priority to women's needs and interests in the same way that

class analysis may require prioritising the needs and interests of the landless and dispossessed. But gender differs from class in that women and men often live in intimate relationships with each other in a way that members of different classes do not. Prioritising women's needs and interests without anticipating men's responses assumes a separatist goal, which will not ultimately result in a gender-equitable society.

**Practical gender needs:** Needs which are related to satisfying basic and material needs of women and men, girls and boys for their day-to-day survival, and which do not change gender patterns.

**Strategic gender needs:** Needs that are related to changing the situation of marginalised people, especially women. Strategic needs may include such issues as legal rights, equal wages, and women's control over resources.

**Gender gap:** Unfair differences in the situation or access to services of men and women. These may result from customary practices, religious biases, social assumption, myths or taboos, among others.

**Gender discrimination:** Where one gender is favoured and the other becomes disadvantaged. Discrimination can occur both deliberately and unconsciously (implicitly). It can occur unconsciously when those responsible are not conscious of gender issues.

**Gender oppression:** Where one gender dominates the other unjustly or even cruelly, whether this happens deliberately or not.

**Gender stereotyping:** The assignment of roles, tasks and responsibilities to a particular gender on the basis of preconceived prejudices.