UNIT: 2 EVOLUTION OF THE GENDER BUDGETING: GLOBAL SCENARIO

Structure

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2.1 INTRODUCTION
For the past two decades, governments, international organizations and civil society groups have used a broad range of approaches to breakdown government budgets and scrutinize them for their impact on women, girls, men and boys. These so-called gender-responsive budget (GRB) initiatives have been adopted as a strategic approach to the assessment of the role of budgets in promoting gender equality. The GRB initiatives make up one of the many tools available to advocates who wish to promote gender equality and women’s rights by influencing budgets.

Gender is the culturally and socially constructed roles, responsibilities, privileges, relations and expectations of women and men, boys and girls — change over time and differ from one place to another. Any government should ensure the availability and allocation of funds for women and men; boys and girls — should be able to understand the different roles, responsibilities and relations of both the gender and should provide budgetary allocations to promote gender equal society.

The rationale for GRB initiatives is that they help bridge persistent inequalities between women and men and facilitate development by integrating gender issues into macroeconomic policy and budgets. In general, GRB initiatives have not been successfully applied to mainstream budgets, which comprise over 90 per cent of government expenditure. Instead, they have tended to concentrate on allocations targeting women and girls, which comprise a very small proportion of national budgets.

2.2 OBJECTIVES
After studying this Unit, you should be able to

- Discuss the origin of gender budgeting process in different countries all over the world;
- Explain the gender budgeting initiatives in South Africa and Australia; and
- Examine the gender budgeting initiatives in India.

2.3 WHAT IS GENDER BUDGETING?
Government has to provide equal priorities to both the gender when framing policies and programmes. Women are generally considered as the socially and economically disadvantaged group. Hence the government budget needs to be focused on women. This
should not be misunderstood as special attention to the particular gender. Instead, the gender based budget should equally address the different needs of both the gender. But wherever necessary, special allocation in budget shall be made to women so as to improve the socially and economically disadvantaged group. Therefore special allocations shall be regarded as the form of affirmative action to reduce the gender gap and initiate a change or among the socially and economically vulnerable group.

The term gender budgeting has been differently defined in different documents.

Gender budgeting is defined as; “It is the dissection of the government budget to establish its gender differential impact and to translate gender commitments into budgetary commitments.”

It is also defined as a ‘methodology that facilitates government to integrate gender perspective in the budget’ to promote gender equal society.

“Gender budget initiatives analyze how governments raise and spend public money, with the aim of securing gender equality in decision-making about public resource allocation; and gender equality in the distribution of the impact of government budgets, both in their benefits and in their burdens. The impact of government budgets on the most disadvantaged groups of women is a focus of special attention.” (IDRC, 2001)

Gender Budgeting is also termed as

- Gender –Based budgeting
- Gender Responsive budgeting
- Gender Sensitive budgeting

It leads to assess the impact of government revenue and expenditure on women. Gender responsive budgets are the budgets which are planned, approved, implemented, monitored and audited in a gender sensitive manner. Gender Budgets highlights the access to resources and the power to bargain for such accessibility differs among the different members of the household and therefore does not allow considering household as a single unit. By this way gender budgets differs from the other budgets.

The Gender Budgeting process constitutes the following major activities:
1. Allocating adequate resources, formulation and implementation of gender sensitive programmes in order to address the gap between the policy commitment and allocation for women.

2. Mainstreaming gender concerns in public expenditure and policy

3. Gender based audit of the programmes and policies relating to public expenditure, fiscal and monetary matters.

Gender budgeting recognizes the unpaid or unaccounted work done by the women in their families and also in the society that are not valued by the market economy. It denotes that these unpaid work has to be taken care of and credited otherwise it will badly affect the well-being of the people and economic function will not effectively carried out. Therefore Gender budgeting is the tool for gender mainstreaming not only in the areas of education, health and welfare, but should be in the whole development process by including in other areas such as agriculture, defence, commerce, trade etc.,

2.4 ORIGIN OF GENDER BUDGETING

In the fourth International Conference for Women in Beijing in the year 1995 discussed different strategies to implement the Gender and Development approach. Signatory countries of Fourth International Women Conference agreed to mainstream the gender in to their policies and programmes. One of the strategies of Gender and Development Approach is Gender Budgeting.

The theoretical root of gender budgeting is Feminist Economy of Interdependencies between private and public budgets.

The international Organizations like UNIFEM, Common Wealth Secretariat, International Development Research centre, Canada took number of initiatives to pursue gender budgeting initiatives. By looking at the Australian experience, number of countries took initiatives. South Africa is an another example where both civil society and government joined together and initiated the gender budgeting.

In 1984, Australia introduced the first gender budgeting initiative. Taking budgets as essential instruments for promoting gender equality, pioneering analysis of the impact of public budgets on gender relations was carried out. The Australian example was not only crucial in raising awareness, but its approach served as an important point of reference for later gender
budgeting initiatives. Every year since 1989, the British Women’s Budget Group (WBG), consisting of experts from universities, unions and NGOs, has published comments on the national budget.

Their focus is on assessing taxes and transfers, but they also refer constantly to the importance of “engendering” economic policies. In 1993 the Women’s International League for Peace and Freedom (WILPF) established a gender budgeting initiative in Canada. Based on an alternative concept of security, the initiative focused on welfare and defence expenditure. Despite the British and Canadian efforts, until recently most projects had been carried out in the southern hemisphere, often encouraged and supported by international organizations. One of the most prominent examples is probably South Africa’s Women’s Budget Initiative, established after the first democratic elections in 1995. But in Europe Britain’s gender budgeting initiative remained isolated until the end of the 1990s, when France started publishing the “jaune budgétaire”, followed by other new gender budgeting initiatives emerging in several European countries. Gender budgeting now takes place in more than 40 countries all over the world. It is initiated and conducted in a wide variety of ways (Gender budgeting: Final report of the Group of specialists on gender budgeting (EG-S-GB, Directorate General of Human Rights Strasbourg, 2005).

Check Your Progress Exercise 1

Note: i. Use this space given below to answer the question.
   ii. Compare your answer with the one given at the end of this Unit.

1. When the Gender Budgeting initiative started?

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2.5 GENDER BUDGETING INITIATIVES IN VARIOUS COUNTRIES

The notion of using GRB initiatives to promote gender equality became widespread in 1995 with the Beijing Platform for Action when the United Nations called on governments to assess how public expenditures benefited women and to adjust budgets to contribute to
gender equality (Sharp 2003). On the issue of equality of access to employment, the United Nations recommended that governments:

“Analyse, advise on, coordinate and implement policies that integrate the needs and interests of employed, self-employed and entrepreneurial women into sector and inter-ministerial policies, programmes and budgets”. (United Nations 1995 cited by Ruiz 2003: 3)

The adoption of the Platform for Action and the ‘gender mainstreaming’ approach to gender and development emphasized the need to ensure that; gender equality is a goal in all areas of social development. Over the past 20 years, a number of different actors have examined budgets, particularly government expenditure, for their impact on gender and at least 60 GRB initiatives have been implemented worldwide, mostly in developing countries.

In 1989, the United Kingdom Women’s Budget Group (UK WBG) emerged. A think tank composed of gender advocates from various sectors (including the Labour Movement), it originally began by publicly commenting on the effect the national budget under the Thatcher government was having on women. To date, most of the UK WBG’s work has focused on the analysis of national revenue-raising mechanisms, such as changes in taxes and social security instruments.

In 1993, the Canadian non-governmental organization (NGO) Women’s International League for Peace and Freedom conducted a one-time exercise. The initiative concentrated on defence expenditure and the opportunity cost of reallocating it to the social sector.

In the context of developing countries, two NGOs and Members of Parliament jointly launched the South African Women’s Budget Initiative (SAWBI) in 1996. The SAWBI is perhaps the most institutionalized GRB initiative. It has also been cited as one of the most successful initiatives because it draws support from civil society, parliament, government and international agencies. As a result, the SAWBI “has provided a major role model for development of gender-responsive budgets”. The scheme is a research and advocacy initiative focusing on national and sub-national budgets, with civil society doing the research and parliamentarians engaging in advocacy. During the first five years, the SAWBI only
focused on analyzing the gender impact of expenditures. Analyses of the revenue side of the budget began later with research on direct and indirect taxation, donor funds, and excise and customs.

In 1996, inspired by the pioneers, the Commonwealth Secretariat launched a pilot project of government-led GRB initiatives in Barbados, South Africa, Sri Lanka, and St Kitts and Nevis designed to enhance government capacity to apply gender analysis to policy and budgets. The pilot was also seen as a way of institutionalizing the Commonwealth Secretariat’s gender mainstreaming strategy into policy development and implementation. Prior to the pilot, the Commonwealth Secretariat had developed an innovative Gender Management Systems tool, a comprehensive and system-wide methodology for gender mainstreaming. The Commonwealth Secretariat pilot GRB initiatives served as monitoring tools for tracking expenditure in the Gender Management Systems methodology. Countries participating in the pilot took a sectoral approach to GRB work by focusing on the expenditure side of the budget in three sectors: health, education and agriculture.

Given the similarity of the Commonwealth Secretariat’s structure to that of the ILO (in terms of governments formulating policy for the Organization), it is important to highlight the approach taken by the Commonwealth Secretariat to move the pilot forward and highlight the lessons learned. In 1995, the Commonwealth Secretariat developed the Commonwealth Plan of Action on Gender and Development. The Plan was a strong political tool within the Commonwealth Secretariat because it went beyond just mandating governments to take action. It required the Commonwealth Secretariat to enhance its expertise in key areas; play a coordinating function; offer leadership and assistance; and forward progress reports to the Commonwealth Heads of Government.

In 1996, the Commonwealth Ministers Responsible for Women’s Affairs and the Finance Ministers endorsed the pilot project. Within the organization, the Commonwealth Secretariat Gender Section put significant effort into generating and winning support from Commonwealth Secretariat’s economic programme divisions. Throughout the process, Ministers responsible for Women’s Affairs at the country level strove to convince economists and finance officials that gender equality was also their concern.
Requests for technical assistance from Commonwealth Secretariat had to be submitted jointly by the ministries responsible for women’s affairs and finance to facilitate an exchange of expertise. Leading experts were also key players in the process. They justified the rationale for the pilot and explained its operational processes to government officials. Both Rhonda Sharp (one of the leading ‘female bureaucrats’ from the Australian initiative) and Debbie Budlender (community coordinator from the SAWBI) played significant roles in producing a wide range of tools necessary for the pilot’s implementation (Hewitt 2002).

**Gender Budgeting initiatives all over the world**

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<th>Sl.No</th>
<th>Name of the county</th>
<th>Gender Budgeting Initiatives</th>
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<tr>
<td>1.</td>
<td>Austria</td>
<td>Government of Austria financial policies have been changed since February 2000.</td>
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<td>2.</td>
<td>Bangladesh</td>
<td>Initiatives started by doing a pilot by the Policy Research Unit in the Ministry of Health linking gender disaggregated beneficiary assessment with local service delivery. In the beginning the pilot focussed on three aspects related to delivery of the Essential Package of Services. At this stage, the outputs and targets are linked to donor appraisal processes rather than directly to government processes. Thus Bangladesh moved to output budgeting in respect of the full budget. In the beginning stage the exercise focuses only on donor supported sector programmes. The health work draws on a beneficiary assessment that took the form of a large sentinel survey of public perceptions of government services intended to serve as a baseline. There were, apparently, some questions raised as to why an international organisation was doing this work when there were competent local institutions. A weakness of the assessment in gender terms is that virtually all respondents were women.</td>
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Comparison of women’s and men’s preferences and perceptions is thus impossible. A further weakness of beneficiary assessment more generally is that it usually ignores non-users. Evers suggests that gender aware analysis would be useful in this respect in identifying gaps in the current approaches to service delivery. Evers’ report is also useful in its discussion of how each of the Elson tools might be applied in a particular sectoral context. (Evers, 1997:5-6).

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<td>3.</td>
<td>Barbados</td>
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<td>It was the third common wealth country to implement the pilot of Gender budgeting initiatives. The initiatives begun by the visiting common wealth dignitaries. The second step was organising the workshop in April 1999 involving about three representatives from each of the Ministries of Agriculture and Rural Development, Health and Environment, Social Transformation, Education Youth &amp; Culture, and the Attorney General. The workshop used the basic methodology developed during the Sri Lanka training, and reflected in the Commonwealth manual. Participants of the workshop developed for each sector on the basis of gender-targeted, employment equity and mainstream expenditures.</td>
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<p>| 4.  | Botswana |
|   | Like Barbados, the gender budgeting initiatives started by organising a workshop by the UNIFEM in 1998 in Harare. This workshop was attended by a representative of the United Nations Development Programme (UNDP) in |</p>
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<td>Botswana. Botswana Gender ministry and UNDP representative again organized workshop on Gender Budgeting in May 1999 for local level planners, researchers and statisticians and series of workshop also organized.</td>
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<td>5.</td>
<td>Brazil</td>
<td>The initiative started by the Agende, a Brazilian organisation and worked on policy and budgets with central and federal government in the country, focusing on the ministries of Justice, Health and Work and Employment. Due to this initiative, government took new methodology to formulate the budget. This methodology also gives special focus on process.</td>
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<td>6.</td>
<td>Canada</td>
<td>In 1993, the Canadian branch of the Women’s International League for Peace and Freedom developed a women’s budget in celebration of the League’s 75th anniversary. In Canada, focus is more on taxation.</td>
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<td>7.</td>
<td>Chile</td>
<td>Like South Africa, Initiatives were taken by government as well as civil society coordinated by SERNAM, the country’s gender machinery. UNDP also initiated gender budget process in the country’s municipalities.</td>
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<td>8.</td>
<td>El Salvador</td>
<td>Movimiento de Mujeres Melida Amaya Montes is a women’s organisation which is working on budget issues in El Salvador.</td>
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<td>9.</td>
<td>Fiji</td>
<td>With help of common wealth secretariat, initiatives started with the exploratory visit and training in March, 2000. Commonwealth support for the Fiji initiative was subsequently</td>
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postponed following the coup and Fiji’s suspension from the councils of the Commonwealth. But civil society interested to continue the gender budgeting initiatives. The National Council of Women Fiji issued a statement on the mini budget in July 2000 which found there is a lack of gender specific affirmative action in the country.

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<td>10.</td>
<td>France</td>
<td>The French government produces a gender impact statement that it issues together with the budget.</td>
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<td>11.</td>
<td>Germany</td>
<td>A small group within Frauenforum, an NGO which is (or was) a member of Women in Development Europe (WIDE), has been working on gender budgets.</td>
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<td>12.</td>
<td>Ireland</td>
<td>Gender impact assessment is incorporated in the implementation of the National Development Plan, which is a multi-year expenditure plan starting in 2000. The government has drawn up gender impact assessment guidelines to guide the exercise.</td>
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<td>13.</td>
<td>Israel</td>
<td>The Adva Center in Israel conducts analysis of budgets from various angles. Using this basic framework, the document moves systematically through topics that include health, education child allowances, old age pension, unemployment compensation, labour and social affairs.</td>
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<td>14.</td>
<td>Italy</td>
<td>The gender Budget initiatives started by organizing an international workshop on gender auditing of government budgets sponsored by</td>
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The Equal Opportunity Commission of Italy in September 2000. The main sessions focused on experiences in Australia, United Kingdom, the European Union and three African countries (Uganda, South Africa and Tanzania).

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<td>15.</td>
<td>Kenya</td>
<td>Canadian International Development Agency provided funding for three years to key ministries to mainstream the gender in fiscal policy. Different stakeholders in the country as well as international development organization involved. Collection of data and analyze the same was the first step. Over a period central government also recognised gender as a significant issue.</td>
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<td>16.</td>
<td>Lebanon</td>
<td>The regional office of Unifem in Beirut recently organised a one day workshop for UN gender focal points on gender budgeting and auditing.</td>
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<td>17.</td>
<td>Malawi</td>
<td>The first step was to commission a Malawi Gender Aware Country Economic Report, based on Diane Elson’s theory. Once the report published meeting was organized on multi donor consultancy. The meeting provided suggestions to CIDA to support non-governmental organization to do gender budgeting initiatives. In the beginning both NGOs and government sceptical about the issue. Over a period, The Ministry of Gender Affairs, Youth and Community Services is very interested in the initiative later and developed National Gender Policy and commits government committed to developing a gender budget. There is interest from players in</td>
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parliament, including the Finance Committee that had sight of the 1999 report. From the side of the Ministry of Finance there is support for the usual non-gender-specific budget reforms, including public participation in the budget process.

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<td>19. Mexico</td>
<td>Like South Africa, Civil Society in Mexico took initiatives and federal programmes and trained leaders of women NGOs and implemented gender budgeting initiatives in different municipalities with help of Ford Foundation funding. The National Women’s Commission is responsible for a second Mexican initiative, which is located at federal district level. The objective of the programme is to increase awareness among public servants of the administration’s responsibilities in respect of inequities resulting from their programming and budgeting processes. While the target is public servants, civil society organisations have also participated. As a result of the initiative, the ministries of health, education, work, governance, social development and agriculture have signed a convention. A number of programmes and budgets within the different sectors have also been revised.</td>
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<td>22.</td>
<td>Norway</td>
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<td>Peru</td>
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activities relating to women. Expenditures were classified into three categories: generation of income, literacy, reproductive health and nutrition, gender equality, and institutional development. Other aspects of the overall project focus on environment, youth and defence.

The second project is a pilot being carried out by Centro Flora Tristan with the support of Diakonia and Unifem. The project focuses on municipal budgets and is targeted at women councillors in provincial municipalities and districts in urban and rural areas. To date, the initiative has involved 40 municipalities in the coastal, mountain and forest regions of the country.

| 24. Russia | The Open Society Institute is supporting a gender budget initiative. |
| 25. Rwanda | Following the establishment of a Unifem-supported Gender Desk in the Rwanda Parliament, a seminar on gender budgets was organised. The seminar resulted in specific budget allocations for women’s activities in the most recent budget. There has, to date, been no analysis of the extent to which the rest of the budget is gender-sensitive. |
| 26. St Kitts and Nevis | The Commonwealth initiated four pilots in each of the Commonwealth regions. Ranee Jamayaha of Common wealth Secreatry took the main responsibility for training and support. One result of the intervention was that the Ministry |
of Community and Social Development and Gender Affairs was able to argue successfully for a six-fold increase in the allocation for the gender unit.

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<th>Scotland</th>
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<td>After nearly a decade of publishing an annual report on the position of women in Scottish life, the information research and networking organisation, Engender, were invited to a meeting with the Minister of Finance to discuss the relationship between policy and budget. In late 2000, the government agreed to employ someone within the Finance Department to advise government on how to initiate gender impact analysis. Government also agreed to establish a gender advisory group with representation from Engender, other NGOs, the Equal Opportunity Commission, civil servants and politicians.</td>
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<td>The government of the Basque Country has shown interest in introducing a gender sensitive budget approach. The Basque Country's women's office, Emakunde, in partnership with the education information technology company, Infopolis, established a virtual library of materials on gender budgets. (<a href="http://www.infopolis.es/usuarios/bibliotec.htm">www.infopolis.es/usuarios/bibliotec.htm</a>). In addition, Rhonda Sharp was invited to provide a briefing on gender budgets to the President of the Basque Country, his Finance Minister and senior government officials.</td>
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<td>Sri Lanka</td>
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| 30. | Switzerland | Switzerland is the country done gender budgeting initiative than many European county. In March 1994 the trade union of public employees commissioned a study on the direct and indirect impact of cutting the budget deficit on women. The study analysed three issues in respect of public funding:  
  - Effects on employment of women and men both in the public sector and beyond;  
  - Effects on women and men as beneficiaries of state services; and |
<table>
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<th>Country</th>
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<td>Switzerland</td>
<td>- Effects on non-paid work of women. At the federal level, they could identify only 0.5% of expenditure with clear effect, while at cantonal level it was 20%. The study was disseminated through meeting at cantonal and communal level and within parties and trade unions, and at EOO meetings. The Swiss gender budget initiatives are strongest where there is support from progressive political parties and parliamentarians, collaboration with and lobbying by women’s organisations, and strong EOOs. The church and women’s groups within the church have also become advocates of gender budget analysis.</td>
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<td>Tanzania</td>
<td>The Tanzanian gender budget activities were initiated by an NGO, the Tanzanian Gender Networking Programme (TGNP). They drew inspiration from both the South African and Australian initiatives. At this stage it is one of the most developed initiatives with activities spanning government and civil society. Like most of the countries, it started by conducting workshop in 1997. Over the ensuring years TGNP has undertaken or commissioned research on four national sectoral ministries (Education, Health, Agriculture and Industries and Commerce), on the central Finance Ministry and Planning Commission, and on the budget process. It has also done some research in selected districts. The findings of the research have been distributed as mimeos. Approximately a year after TGNP embarked on</td>
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their project, Sida started funding a parallel exercise in the Ministry of Finance. From beginning 2000 things moved more quickly. Near the beginning of the year Sida and the government recognised that TGNP was well placed to act as ongoing consultant to the Ministry of Finance in respect of gender budgeting. Six pilot ministries were chosen, many of them matching those in which TGNP had conducted research. Training workshops and backstopping centred around the newly-introduced medium term expenditure framework (MTEF). Budget officials in selected ministries were already receiving general training in how to follow the steps needed for this type of training. TGNP was invited to attend the initial training. On the basis of that experience they designed and delivered workshops that showed how to integrate gender in each step. This was later formalised into a ‘checklist’, in response to constant demands for ‘tools’. The collaboration seems set to continue and expand. In October British consultants were commissioned by the Ministry of Finance to plan a three-year Public Financial Reform Management Programme which would span all the institutions involved in financial management, not only the budget office. Even before this TGNP, and sometimes other women’s organisations, had been invited in to related government process such as the public expenditure review (PER) and the poverty reduction strategy paper (PRSP). A small group of donor representatives and gender
activists in civil society and government have come together in an informal ‘macro-economics and gender’ group that strategises around the different developments. The engagement in broader processes has ensured that gender is discussed, but has not necessarily ensured that it is properly integrated. However there is no mention of gender or women in the logical framework that will form the basis for implementation.

| 32 | Thailand | The World Bank has initiated a small project in Thailand involving gender analysis of the WID budget within two agencies. |
| 33 | Uganda | The Ugandan initiative has been spearheaded by the NGO, Forum for Women in Democracy (Fowode). Fowode was established by women MPs and has strong links with the special interest groups caucus in parliament which brings together those occupying reserved seats for women, people with disabilities, youth and workers as well as women who have won ‘open’ seats. The gender budget project started in mid-1997 with input and a practical session at the Women’s Caucus meeting to review its first year in parliament. Fowode had done research at different level and published report. The national research focuses on Education, Health, Agriculture and the Ministry of Finance and Economic Planning. Academicians also did research with the support of reference people in the ministry. This created coordination. Findings |
also disseminated among politicians. The Fowode initiative has been facilitated by ongoing changes in the government process that attempt to increase inclusiveness and transparency. The process now provides for significant involvement of sector working groups that include civil society representatives. There is widespread acceptance of the need to focus on poverty alleviation and strong attempts to ensure widespread public participation in determining poverty-related objectives. There are also initiatives to increase the decision-making powers of parliamentarians in respect of budgets. However, the draft expenditure estimates and policy recommendations continue to be subject to approval by the World Bank and International Monetary Fund before presentation to cabinet and parliament.

The district-level research is part of Fowode’s support for women elected at this level. The founders of Fowode were members of the Constitutional Assembly where they succeeded in achieving a one-third quota for local government. The current support activities are intended to ensure that the women elected have the necessary skills to influence local government decision-making. Fowode also sees the current moves to decentralize as potentially advantageous to women in that the majority will not, because of poverty and illiteracy, have a direct influence beyond the local level. Fowode’s training and support provides local councillors with strategic skills to ensure that,
while still a minority, they can influence the majority. It also attempts to move them beyond a frame of mind where they see themselves as personally responsible for solving constituents’ problems to the realization that their role is to ensure that government is transparent, accountable and delivers according to citizens’ needs. There have been discussions as to whether this training should be women-only or instead include men so as to avoid being ‘confrontational’. Overall, Fowode tends to support women-only or women dominated training so as to build self-confidence and assertiveness. In terms of the budget, in the first round of training women councillor participants focused their attention on the women’s vote, a discrete amount of money which many councils set aside for women. In further training Fowode hopes to move them to see this vote as a ‘diversion’ and to concentrate instead on looking at the impact of all other expenditures and revenue.

For the research at the local level, Fowode has, as at national level, gone for an inclusive approach. The workshop that laid the basis for the first research brought together local government officials, MPs, councillors, NGOs and researchers.

Surprisingly, given the strength of the initiative and the receptive environment, Fowode experienced some difficulty in obtaining funds. Some of the early work was sponsored by UNDP. The current district level work is
supported by Danida. Beyond the Fowode initiative, the Association of Uganda Professional Women in Agriculture and Environment (AUPWAE) carried out studies on resource allocation at institutional and family level in four sub-national areas. This was done as part of a broader East African project funded by Winrock International Program. Methods included focus group discussions, interviews with representatives of women in local councils, disabled and a few others, secondary data collection, participatory rural appraisal, and other techniques.

Further, in October 1999 the Ugandan Debt Network organised a workshop on gender advocacy and budgets that brought together representatives of several NGOs, including Fowode and AUPWAE.

| 34. United Kingdom | The key player in the United Kingdom is the extra-governmental Women’s Budget Group. This is a loose and small group of gender activists from different sectors. In November 1998 the Treasury and Women’s Budget Group co-hosted a one-day workshop which included inputs on the South African, Canadian and Norwegian experiences of gender-related budget, policy and time use work. Since then, besides submissions at critical points, the Group has had regular meetings with Treasury. For example, Treasury paper 9 of 1998 on ‘Women and the Budget’ quotes the Chancellor |
as acknowledging that women predominate in ‘workless households, low earners, part-timers, and people with caring responsibilities’, all of which ‘have often been ignored’ (Her Majesty’s Treasury, 1998).

The Women’s Budget Group’s own publications attempt to go deeper in questioning the economic framework implicit in the approach of the Treasury (and general society). So, for example, there is a lot of emphasis on the care economy, and on time. The Group’s writing, while acknowledging that the government has a stated commitment to poverty eradication, particularly among children and their carers, questions whether this commitment will be honoured if and when it comes into conflict with other policy objectives, such as ‘keeping British industry competitive’ (Himmelweit, 2000).

The Group focuses on efficiency arguments for gender responsiveness. It argues that these arguments fit well with the Treasury’s concern with ‘value for money’. It argues, too, that the efficiency argument constitutes a more radical approach than ‘fairness’ if it is based on an understanding that the concept of ‘efficiency’ in economic theory needs to be redefined (Himmelweit, 2000).

Unlike many other gender budget exercises, the UK one focuses more on taxes and benefits than expenditure. This partly reflects the nature of budgets in the country, in that budget day itself focuses on taxes rather than on spending.
Spending is announced later in the year, with very little publicity and public interest. The focus on taxes and benefits also reflects the fact that these affect a far larger proportion of the British population than they do in developing countries.

| 35. United States of America | The United States of America (USA) is one of the few countries not to have ratified the Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW). Gender Analysis and Gender Budgeting initiatives are taken by different states and municipalities. |

| 36. Vietnam | The 1999/2000 Vietnamese public expenditure review coordinated by the World Bank, bilateral donors and the government explicitly gave some attention to gender issues. The Netherlands Embassy played a key role in ensuring that this was done and providing support for the innovation. During the exercise there were ongoing tensions as to what mainstreaming of gender into a PER should entail. The Bank interpreted it as largely confined to the impact of expenditure, particularly in the social sectors. Others argued for a broader analysis that included examination of imbalances at the institutional level. During the research stage there were problems when the ‘non-gender’ specialists had difficulty in understanding how to incorporate gender into their analysis. Despite these difficulties, the initiative should bring |
some concrete results as the Bank and Ministry of Finance have agreed on a timetable for implementation of some of the recommendations, including some gender-related ones.

<table>
<thead>
<tr>
<th>No.</th>
<th>Country</th>
<th>Initiatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>37.</td>
<td>Zambia</td>
<td>Initiatives started by organizing workshop by Unifem in 1998. Government officials participated the workshop. By looking at the South African initiative, gender unit in the government had discussed with finance ministry before the workshop to engender the macroeconomic policy. Activities since the workshop have included training for gender focal points, planners in sector ministries and women parliamentarians. Outside of government, the NGO Coordinating Committee held a workshop to discuss how gender issues could be addressed in the 2000 budget.</td>
</tr>
<tr>
<td>38</td>
<td>Zimbabwe</td>
<td>A team of Zimbabwean researchers was funded as part of the Gender and Economic Reform in Africa (GERA) initiative to conduct gender budget analysis. Unifem and other UN units are facilitating civil society to carry forward the work.</td>
</tr>
</tbody>
</table>


**Check Your Progress Exercise 2**

**Note:**

i. Use this space given below to answer the question.

ii. Compare your answer with the one given at the end of this Unit.

1. Discuss any two countries gender budgeting initiatives.
2.6 GENDER BUDGETING INITIATIVE IN AUSTRALIA

Gender based Budgeting or Gender responsive budgeting are first initiated in mid 1980s in Australia when the federal and the state government implemented ‘women’s budget statements (WSBs)’ in order to mainstream gender in social and economic policies. Thereby Australian government established a model which ensures that each government agency provides the audit of the annual budget of government’s achievement in relation to boys and girls/ men and women. When the Labor Prime Minister Bob Hawke was elected to the office on the platform of economic and social reform, introduced the new budget paper in order to understand the impact of their budget on women. This initiative of Federal governments gender budget exercise lasted throughout the twelve years of labor held office (from 1984 to 1996).

It can be said that the initiatives taken by the feminist movement in Australia has led to the establishment of this budgetary exercise towards mainstreaming gender. Specialized policy machinery was established during 1970s in Australia for the advancement of women’s economic and social status. This policy machinery model was developed by the women’s movement and with the presence of the feminists in the women’s policy units worked to gain support for the gender budgeting among the key players in the state.

Anna Summers, who was the Head of the office of status of women and women’s adviser to the prime minister, was known to be the key person to develop the first gender budget at the federal level. Later when the labour government came into power in 1983, it gained support from a high level task force of permanent secretaries. This task force engaged in various activities like getting high level commitment to the women’s budget and other initiatives and ensured departmental support before proposals went to cabinet.

The entire idea was that there should be a specialized government units emerged from the feminists thought with the notion that; ‘given the different locations of women and men in the economy and society, no government activity could likely to stay gender neutral in its effects.’ According to the director of the south Australian women’s adviser’s office; “the purpose of the women’s budget was to obtain information about what is being done for
women, to raise the profile of women’s programmes in bids for funding, but also to build into each department a clear awareness that everything they do, every dollar they spend has an impact on women and that impact is very often different for women than for men.”

The women’s policy machinery was located at a high level within government in the department of the prime minister and cabinet at the federal level and in the department of the premier and cabinet at the state level. This meant that coordinating policy and assessing cabinet submissions rather than providing services to women would serve as the primary function of the women’s policy offices. In this position the policy advocates soon realized that to coordinate policy and assess cabinet submissions effectively, engagement with the budget was essential.

Six Australian states and two territories implemented the gender budget initiatives during 1980s and 1990s. The south Australian women’s budget divided expenditures into three categories:

i) Women- specific expenditures
ii) Equal opportunities in the public service
iii) General or Mainstream expenditures

The women’s policy machinery in Australia worked closely with Treasury Department in coordinating and driving the women’s budget initiatives... In most cases the report was published as one of the government’s budget papers. The Australian initiative is thus a clear example of a bureaucracy-based strategy. The published results were presented to Australian women to communicate what the government had achieved in terms of its commitment to women’s equality and women in development process.

2.6.1 Strengths of the Australian Experience

1. Raising awareness among government bureaucrats of the impacts of their policies on women; particularly in questioning the gender-neutrality of policies;
2. Enhancing advocacy efforts and building capacity on gender mainstreaming; Having an impact on policy and budgets (e.g. increased annual spending on child care);
3. The South Australian WBS had a strong monitoring system of government policy on female representation in government bodies, such as boards and committees; and
4. In New South Wales, the Women’s Coordination Unit was granted a formal role in the budgetary process during a certain number of months over the year.

### 2.7 THE CASE IN SOUTH AFRICA

But the case in South Africa was different. They developed two different gender budgeting process. One initiative was with the involvement of the NGOs and the parliamentarians and the other within the national government led by finance ministry. The NGO-parliament initiative began in 1995, which was coordinated by two policy research agencies; NGOs and the parliamentary committee was termed as Women’s Budget initiative (WBI). Within the first three years the WBI published three books that examined all the 27 portfolios in the national budget.

During the period of the 1948 to 1993, the blacks in South Africa were denied equal opportunities in social, political and economic life and in particular the women were given menial jobs often coupled with violence and sexual harassment. When the democratic government came into power in 1994, most of the parliamentarians (who struggled to end the violence against women during apartheid era) were keen to establish a gender sensitive budgets and to ensure the government’s commitment to implement these polices. The fourth world conference held in Beijing which was known as “Beijing platform of action” on women in September 1995 focused the commonwealth nations to initiate the process of incorporating the gender issues in the macro economic planning and policy making. South Africa being one of the member of the commonwealth nations, committed to implement the critical issues of the declaration made at the conference by commonwealth secretariat. Pregs Govender one of the 100 New Women’s Member of Parliament contributed further to advocate the initiative in South Africa.

WBI was launched with the collaborative efforts of parliamentarians (the joint standing committee on finance) and two NGOs named ‘the institute for democracy in South Africa (IDASA) and the community agency for social enquiry (CASE). In 1996, instead on the joint committee of finance, the status and quality of life of women was established and it later constituted by the team of parliamentarians, governments officials and members of NGOs.
From then onwards till 2000 the women’s budget was prepared every year with the aim of analysing any form of the public expenditure or method of raising revenue in the context of the benefits that would accrue to women and girls in relation to the men and boys.

The initiative was divided into two phases: where the first phase introduced in the sectors of the welfare, education, housing and reconstruction and development program include the cross-cutting themes of taxation and public sector employment. The second phase which was introduced during the period of 1997 included the areas such as health, justice, safety and security, correctional services, home and foreign affairs, agriculture, land affairs and energy.

Here the function of the NGOs is to collect information, undertake research and produce the analysis results. And the parliamentarian provides information to access, and focuses in terms of key political issues and offer necessary policy support.

### 2.8 GENDER BUDGETING INITIATIVES IN INDIA

In India eight plans (1992-1997) highlighted the gender budgeting initiative for the first time and the need to ensure the definite flow of funds from general development sector to women. The Ninth plan adopted “women component plan” to ensure not less than 30 percent of funds/benefits are earmarked to all development sectors related to women and directed to central and state governments to do so. A special vigil was established to monitor the flow of funds to ensure the holistic approach to empower women.

Tenth plan reinforced the commitment towards gender budgeting initiatives and came with the mission statement as “budgeting for gender equity”. The tenth plan has developed a framework of activities such as

- Quantification of allocation of resources for women in central, state and local budgets and expenditure.
- Gender audit of monetary, fiscal and trade policies of the central and state governments.
- Impact assessment of various schemes in union and state budgets.
- Analysing the programmes, strategies, policy initiatives from the perspective of their impact on the status of women as reflected in the important macro indicators such as literacy, Maternal Mortality Rate and Participation of workforce.
- Institutionalizing and collection of gender disaggregated data.
The first formal exercise in gender budgeting at the national level was undertaken by the National Institute of Public Finance and Policy. They analysed the union budget and categorized the public expenditure under three main types in their report on NIFP as follows:

- Specific allocation targeted on women and girls;
- Pro-women allocation which are the composite expenditure of schemes with women component;
- Mainstreaming public expenditures that have gender differential impacts.

The department of Women and Child Development also commissioned a study on gender analysis of budgets of all states from the period of 1993-94 and 2002-03 so as to generate the time series data for the budgeted expenditure on women by the state governments in the respective years.

At the state level Karnataka was the pioneer in gender budgeting initiatives by earmarking resources to women in various sectors of development. States like Kerala and Tamil Nadu has achieved a higher degree of progress in all gender related indicators on health, literacy and employment through successful implementation of gender related programmes particularly by mobilizing self help group movements.

2.9 CIVIL SOCIETY INITIATIVES: CURRENT APPROACH TO GRB WORK

The lessons learned from the Commonwealth Secretariat’s pilot have helped shape most of the on-going GRB work. However, despite careful planning and implementation of the pilot, none of the initiatives have been sustainable. The major lesson learned was that the involvement of civil society is critical, particularly in terms of generating demand for the continuation of the initiatives. To some extent, the structure of the Commonwealth Secretariat played against the organization in terms of the involvement of civil society in programme implementation.

According to the Commonwealth Secretariat, the key is to respect national ownership of GRB exercises and support initiatives that promote civil society participation in decision-making processes. As a result of the pilot, the Commonwealth Secretariat joined forces with the United Nations Development Fund for Women (UNIFEM) and the International Development Research Centre (IDRC) to address this issue - UNIFEM works with civil
society to enhance women’s condition, whilst IDRC’s builds research capacity and knowledge management (Budlender et al. 2002; Hewitt 2002).

Currently the Commonwealth Secretariat, UNIFEM and IDRC are jointly implementing the global Gender-responsive Budget Initiatives Programme. Most on-going GRB initiatives under the programme are characterized by a stronger link between government budgets and civil society. Thus, the strong sustainability of the South African initiatives compared to those of Australia and the Commonwealth Secretariat has shown that engaging civil society is critical in ensuring the continuity of GRB work.

The fact that Commonwealth Secretariat was able to seek direct political support from governments (through the Ministries of Finance and Women's Affairs) for the endorsement of the GRB pilot is relevant to the ILO because of its tripartite structure where governments, and workers’ and employers’ organizations, constitute its governing bodies. On the one hand, this means that ILO support for GRB exercises in future work focusing on government budgets could involve direct collaboration with the Ministries of Labour (MoL).

On the other hand, the ILO would be able to seek political support from workers’ and employers’ organizations and promote their participation in budget advocacy. The ILO also has the potential to support initiatives (e.g. gender audits) in relation to workers’ and employers’ organizations own budgets. Finally, the ILO could consider its own trajectory in terms of gender mainstreaming in pursuing GRB work in the future.

2.10 RELEVANCE OF GRB INITIATIVES TO THE WORK OF THE ILO

Gender-responsive budget initiatives have the potential to contribute to the promotion of gender equality in the ILO Decent Work Agenda. The Decent Work Agenda seeks to promote social justice by advocating a rights-based approach to development. The overall goal of the ILO is to promote equal opportunities for both women and men to engage in decent work “in conditions of freedom, equity, security and human dignity. Decent work means meeting or exceeding core social standards – setting a threshold for work and employment which embodies universal rights” (ILO 2000).
Equality between men and women is central to the ILO’s mandate. This is reflected in the 1998 ILO Declaration on Fundamental Principles and Rights at Work and in the four key ILO Conventions referring to gender equality – Convention No. 100 on Equal Remuneration, Convention No. 111 on Discrimination in Employment and Occupation, Convention No. 156 on Workers with Family Responsibilities, and Convention No. 183 on Maternity Protection. In promoting these principles, the ILO has identified gender equality as a key operational objective cutting across four strategic objectives under its Decent Work Agenda.

In this context, ILO has adopted a gender mainstreaming strategy as the basis for the Organization’s integrated approach to promoting gender equality and Decent Work. Similar to the ILO Decent Work Agenda, GRB initiatives seek to promote social justice by advocating a social and equitable approach to development. They can be characterized as being people-centered budget initiatives similar to pro-poor and children’s budget initiatives. Their ultimate goal is to “reprioritize” government expenditure and formulate revenue-raising policies to promote social justice (UNDP 2000).

2.11 SUMMING UP
In this Unit, We have discussed the origin of Gender Budgeting initiatives and how feminist economic research contributed to engender the public economics. Apart from the origin of Gender Budgeting Initiatives, This Unit also traces the contribution of International agencies like International labour Organization, The World Bank and United Nations bodies to initiate the gender budgeting process in the various Common Wealth Nations and other countries.

2.12 GLOSSARY

**Gender Management System**: Gender Management System is a network of structures, mechanisms and process put in place within existing organizational framework, to guide, plan, monitor and evaluate the process of mainstreaming gender into all areas of the organization’s work, in order to achieve greater gender equality and equity within the context of sustainable development.

2.13 ANSWERS TO CHECK YOUR PROGRESS EXERCISES

Check your progress Exercise 1

1. In the fourth International Conference for Women in Beijing in the year 1995 discussed different strategies to implement the Gender and Development approach.
Signatory countries of Fourth International Women Conference agreed to mainstream the gender into their policies and programmes. One of the strategies of Gender and Development Approach is Gender Budgeting. The theoretical root of gender budgeting is Feminist Economy of Interdependencies between private and public budgets. The international Organizations like UNIFEM, Common Wealth Secretariat, International Development Research Centre, Canada took number of initiatives to pursue gender budgeting initiatives. By looking at the Australian experience, number of countries took initiatives. South Africa is another example where both civil society and government joined together and initiated the gender budgeting. In 1984, Australia introduced the first gender budgeting initiative.

Check Your Progress Exercise 2

2. In 1996, inspired by the pioneers, the Commonwealth Secretariat launched a pilot project of government-led GRB initiatives in Barbados, South Africa, Sri Lanka, and St Kitts and Nevis designed to enhance government capacity to apply gender analysis to policy and budgets. The pilot was also seen as a way of institutionalizing the Commonwealth Secretariat’s gender mainstreaming strategy into policy development and implementation. Prior to the pilot, the Commonwealth Secretariat had developed an innovative Gender Management Systems tool, a comprehensive and system-wide methodology for gender mainstreaming. The Commonwealth Secretariat pilot GRB initiatives served as monitoring tools for tracking expenditure in the Gender Management Systems methodology. Countries participating in the pilot took a sectoral approach to GRB work by focusing on the expenditure side of the budget in three sectors: health, education and agriculture. Given the similarity of the Commonwealth Secretariat’s structure to that of the ILO (in terms of governments formulating policy for the Organization), it is important to highlight the approach taken by the Commonwealth Secretariat to move the pilot forward and highlight the lessons learned. In 1995, the Commonwealth Secretariat developed the Commonwealth Plan of Action on Gender and Development. The Plan was a strong political tool within the Commonwealth Secretariat because it went beyond just mandating governments to take action. It required the Commonwealth Secretariat to enhance its expertise in key areas; play a coordinating function; offer leadership and assistance; and forward progress reports to the Commonwealth Heads of Government. In 1996, the Commonwealth Ministers Responsible for Women’s Affairs and the Finance
Ministers endorsed the pilot project. Within the organization, the Commonwealth Secretariat Gender Section put significant effort into generating and winning support from Commonwealth Secretariat’s economic programme divisions. Throughout the process, Ministers responsible for Women’s Affairs at the country level strove to convince economists and finance officials that gender equality was also their concern. Requests for technical assistance from Commonwealth Secretariat had to be submitted jointly by the ministries responsible for women’s affairs and finance to facilitate an exchange of expertise. Leading experts were also key players in the process. They justified the rationale for the pilot and explained its operational processes to government officials. Both Rhonda Sharp (one of the leading ‘female bureaucrats’ from the Australian initiative) and Debbie Budlender (community coordinator from the SAWBI) played significant roles in producing a wide range of tools necessary for the pilot’s implementation (Hewitt 2002).

2.14 REFERENCES

Budlender, Debbie, Diane Elson, Guy Hewitt, Tanni Mukhopadhyay, (2002), Gender Budgets Make Cents, Commonwealth Secretariat, IDRC CRDI, UNIFEM.


2.15 QUESTIONS FOR REFLECTION AND PRACTICE

1. Trace the gender budgeting process in Australia and South Africa
2. Explain the gender budgeting initiative in India.