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Gender Budgeting



Towards a New Dawn

Chapter 5

Gender Budgeting

5.1 Even after over six decades of independence, a significant number of women in India face disparities in access and control over resources. These disparities get reflected in important social development indicators such as health, nutrition, literacy, educational attainments, skill levels, occupational status etc. In addition, there are a number of gender specific barriers that prevent women from gaining access to their rightful share in the flow of public goods and services.

Unless these gender requirements and their felt needs are incorporated and mainstreamed in the planning and development process of the country, it is likely that the benefits of economic growth will completely bypass a significant section of the country's population.

Box 1 Gender and Sex

Gender is culturally and socially constructed roles, responsibilities, privileges, relations and expectations of women and men, boys and girls and changes with time and from place to place.

Sex refers to biological differences between the male and female of the species. It remains unchanged.

5.2 *Gender Budgeting is a process* that entails maintaining a gender perspective at various stages like programme / policy formulation, assessment of needs of target groups, review of extant policies and

guidelines, allocation of resources, implementation of programmes, impact assessment, reprioritization of resources and so on. *A gender responsive budget is the culmination of this process.*

5.3 Gender Budgeting involves dissection of the Government budget to establish its gender-differential impacts and to translate gender commitments into budgetary commitments. It does not seek to create a separate budget but to provide affirmative action to address the specific needs of women.

5.4 Gender Budgeting lends itself to strengthening administrative processes and actions to achieve the targets for improvement in the position of women. It not only entails a look at allocation of resources for women but goes beyond to cover tracking the utilization of allocated resources, impact analysis and beneficiary incidence analysis of public expenditure and policy from a gender perspective.

5.5 **Critical activities** constituting the gender budgeting exercise thus include:

- a) Addressing gap between policy commitment and allocation for women through adequate resource allocation and gender sensitive programme formulation and implementation
- b) Mainstreaming gender concerns in public expenditure and policy.
- c) Gender audit of public expenditure, programme implementation and policies

Box 2 Gender Budgeting and Five-Year Plan

The Plan documents have over the years reflected the evolving trends in gender matters. Formal earmarking of funds for women began with the Women's Component Plan. However, gender sensitivity in allocation of resources starts with the Seventh Plan

- The **Seventh Plan** introduced the concept of monitoring of 27 beneficiary oriented schemes for women.
- The **Eighth Plan** (1992-97) highlighted, for the first time, a gender perspective and the need to ensure a definite flow of funds from the general developmental sectors to women. The Plan document made an express statement that “...the benefits to development from different sectors should not by pass women and special programmes on women should complement the general development programmes. The latter, in turn, should reflect great gender sensitivity”.
- The **Ninth Plan** (1997-2002) adopted the 'Women's Component Plan' as one of the major strategies and directed both the Central and State Governments to ensure “not less than 30 per cent of the funds/benefits are earmarked in all the women's related sectors. Special vigil advocated on the flow of the earmarked funds/benefits through an effective mechanism to ensure that the proposed strategy brings forth a holistic approach towards empowering women.
- The **Tenth Plan** reinforces commitment to gender budgeting to establish its gender-differential impact and to translate gender commitments into budgetary commitments. It states “.....the Tenth plan will continue the process of dissecting the Government budget to establish its gender differential impact and to translate gender commitments into budgetary commitments.
- The Tenth Plan will initiate immediate action in tying up these two effective concepts of Women Component Plan and Gender Budgeting to play a complementary role to each other, and thus ensure both preventive and post facto action in enabling women to receive their rightful share from all the women related general development sectors.”
- The **Eleventh Plan** The Eleventh Plan clearly states, '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'.

Box 3 - Women Component Plan and Gender Budgeting:

The Planning Commission has clarified that, “...*Women Component Plan should no longer be used as a strategy either at the Centre or at the State level. In its place as already initiated by the Ministry of Finance and Ministry of Women and Child Development, we should adopt Gender Responsive Budgeting or Gender Budgeting only.*”

Gender mainstreaming

5.6 Welfare programmes, for women and girls, alone may not lead to gender equality.

Problems impeding gender equality are not linear but cut across sectors. Further, the bulk of the public expenditure and policy concerns lie in 'gender neutral' sectors like power, defence,

petroleum, transport etc and the implications for women in these sectors are not recognized or identified. It is increasingly being felt that unless gender concerns are also mainstreamed in these sectors, public expenditure will always be skewed disadvantageously towards women. Hence, the imperative need for gender mainstreaming as natural outcome of Gender Budgeting.

Box 4 Income generation for Tsunami Victims

Crab and lobster tracking technology was developed for elderly and widowed fisherwomen where the cages are left in the water. It ensured good catch and income went up from Rs. 300 to Rs. 2000 over a period of time.

Department of Earth Sciences

Box 5 What technology means for Women:

A bus designed without seats to carry vegetables, goats etc.

Cotton cloth designed for different uses- cradle, carry seeds, fodder etc.

Low cost disposable sanitary napkins.

Women friendly protective shoes in salt brines.

Department of Science and Technology

Box 6 There is no Sector which is Gender Neutral

Department of Space

Village Resource Centre broadcasts through space on malnutrition, health etc.

EDUSAT and GRAMSAT taking information and education to remote areas.

Department of Commerce

Gender Implications for Women in SEZ projects and WTO agreements.

Department of Atomic Energy

Nuclear Medicine for treatment of thyroid, uterine, ovarian cancer etc

Energy requirements for women

Budgeting Cells in all Ministries/ Departments. He highlighted the perceived need for budget data to be presented in a manner that brought out the gender sensitivity of the budgetary allocations. This was followed by a more emphatic commitment in the Budget speech of 2005-06, wherein the Gender budgetary allocations were reflected in a two-way classified Gender Budgeting Statement in the Union Budget. The first part of the Statement, Part A, indicated those Ministries/Departments which identified Schemes/Programmes with 100% allocation flowing to women and second part, i.e., Part B listed Schemes/Programmes with 30 to 99% allocation for women. Box 7 shows the allocations for women as reflected in the Gender Budget Statement over the years.

Institutionalisation of Gender Budgeting

5.7 To provide impetus to Gender Budgeting, the Finance Minister in 2004-05 had mandated the setting up of Gender

Box 7 – Allocations for women as reflected in the Gender Budget Statement (Statement 20) over the years

Year	No. of Ministries (No. of Demands)	Total Magnitude of Gender Budget (BE) (crore)
2005-06	9 (10)	14378.68 (2.79 %)
2006-07	18 (24)	28736.53 (5.09%)
2007-08	27 (33)	31177.96 (4.5%)
2008-09	27 (33)	27661.67 (3.68%)
2009-10	28 (33)	56857.61 (5.57%)

5.8 There was an apparent fall in the Gender Budget allocation for women between 2006-07 and 2007-08 on account of a more accurate reflection of the actual amounts flowing to women through programmes and schemes. The percentage of estimated allocation to women further fell in the Year 2008-09 because of the introduction of Statement on Child Budgeting in the Union Budget, i.e., Statement 22. Several schemes such as Integrated Child Development Services scheme of Ministry of Women and Child Development and Sarva Shiksha Abhiyaan of the Ministry of Human Resource Development which were earlier being reflected in the Gender Budget Statement were shifted entirely to Statement 22 with no identification of funds flowing to girl children. In 2009-10, an attempt was made to reflect the allocations for girl children under some of the schemes that were shifted to Statement 22 in Part B of Statement 20.

5.9 Refinement of the Gender Budget Statements to reflect accurately the allocations earmarked for women and girls is an ongoing process.

5.10 The Ministry of Finance in consultation with the Ministry of Women and Child Development had issued a Gender Budget Charter on March 8, 2007. The Charter laid down guidelines for composition and functions of the Gender Budgeting Cells which is at **Annexure- XXII**.

5.11 The Ministry of Women and Child Development has been continuously and actively pursuing with Ministries for setting up of Gender Budgeting Cells (GBCs). So far, 56 Ministries/ Departments have set up GBCs. The list of Ministries and Departments that have set up Gender Budgeting Cells is indicated in **Annexure-XXIII**. These Cells are expected to serve as focal points for coordinating Gender Budgeting initiatives both intra and inter ministerial.

Other Initiatives

5.12 The Ministry of Women and Child Development, as the nodal agency for gender

budgeting has been undertaking several other initiatives for taking it forward at National and State levels. In 2004-05, the Ministry adopted "**Budgeting for Gender Equity**" as a Mission Statement. The mainstreaming of gender concerns has been reiterated as a mission of the Ministry in its Results Framework Document in 2009-10.

1. Workshops and Training Programmes

5.13 During the period 2009-10, the Ministry of Women and Child Development organised 13 training programmes and 15 Workshops/Seminars/Conferences on the subject in collaboration with Institutes such as Indian Institute of Public Administration (IIPA), Lal Bahadur Shastri National Academy of Administration (LBSNAA), State Institutes of Rural Development, Administrative Training Institutes and the State Governments for different groups of stakeholders. Apart from organizing training programmes, technical resources were provided at workshops organized by other agencies.

5.14 The Ministry also supported five State Training Institutes in the states of Madhya Pradesh, Orissa, Chhattisgarh, Jharkhand and Rajasthan, to organize a series of Gender Budgeting trainings for district and state level officers of their States. A List of activities undertaken by the Ministry during 2009-10 are at **Annexures- XXIV, XXV and XXVI**.

2. Development of Resource Material

5.15 In collaboration with UNDP, UNIFEM and International experts, the Ministry has developed a Handbook on Gender Budgeting for Gender Budget Cells in Central Ministries and Departments as well as a Training Manual for Ministries and Departments of Government of India. The objective of the Training Manual is to create a core group of Trainers who in turn shall facilitate Gender Budgeting Trainings in their respective Ministries and Departments.

5.16 The Ministry has developed a Strategic Framework of Activities and a range of tools which can be applied at different stages of the budget making process for ensuring gender equitable outcomes of all programmes and schemes of the Government. Some of these tools constitute

different entry points, such as, Spatial Mapping; Participatory planning and budgeting; Gender Based Profile; Impact Analysis through monitoring, evaluation and

field level surveys; and Guidelines for Gender Sensitive Review of Public Expenditure and Policy (in the form of Checklist I and II is at Boxes 8 and 9) for undertaking Gender Budgeting activities.

Box No. 8

Checklist- I for Gender Specific Expenditure

Conventionally, gender budget analysis, by way of isolation of women related expenditure, has been carried out for Ministries/Departments like Health and Family Welfare, Rural Development, Human Resource Development, Urban Employment and Poverty Alleviation, Youth and Sports Affairs, Labour, Social Justice and Empowerment, Tribal Affairs, Drinking Water, Small Scale Industries and Agro and Rural Industries, Science and Technology, Non-Conventional Energy Sources, Textiles and Agriculture.

Suggested steps that may be undertaken by these various Ministries/Departments who are running programmes/schemes of a gender specific nature i.e. where the targeted beneficiaries are primarily women are as follows:

Planning and Budgeting

- i. **List of schemes and programmes** which are **gender specific**
- ii. Briefly indicating **activities undertaken** under the programme for women.
- iii. Indicating expected **output indicators** like number of women beneficiaries, increase in employment of women, post project increase in resources/income/skills etc.
- iv. **Quantifying allocation of resources** in annual budget and physical targets thereof.
- v. Assessing **adequacy of resource** allocation in terms of population of targeted beneficiaries that need the concerned schematic intervention, the trend of past expenditure etc.

Performance Audit

- vi. Reviewing actual performance- physical and financial vis a vis the annual targets and **identifying constraints** in achieving targets (like need for strengthening delivery infrastructure, capacity building etc.)
- vii. Carrying out **reality check- Evaluation of programme intervention**, incidence of benefit, identifying impact indicators like comparative status of women before and after the programme etc
- viii. Compiling a trend analysis of expenditure and output indicators and impact indicators.

Future Planning and Corrective Action

- ix. **Addressing constraints** identified from step (vi) above.
- x. Establishing requirement of Resources in terms of population of targeted beneficiaries/ magnitude of perceived problems like IMR, MMR, literacy ratio etc.
- xi. Reviewing **adequacy of resources** available financial and physical like trained manpower etc.

Planning for **modification in policies and/or programmes/schemes** based on results of review.

Box 9
Checklist- II for Mainstream Sectors

Mainstream sectors like **Defence, Power, Telecom, Communications, Transport, Industry, Commerce** etc. may consider adopting the following check list to determine the gender impact of their expenditure.

- i. **List of all programmes** entailing public expenditure with a brief description of activities entailed.
- ii. Identifying target group of beneficiaries/users.
- iii. **Establishing whether users/beneficiaries are** being categorized by sex (**male/female**) at present and if not to what extent would it be feasible.
- iv. Identify possibility of undertaking **special measures** to facilitate **access of services for women**- either through affirmative action like quotas, priority lists etc. or through expansion of services that are women specific like all women police stations, women's special buses etc.
- v. Analysing the **employment pattern** in rendering of these services / programmes from a gender perspective and examining **avenues to enhance women's recruitment**.
- vi. Focus on **special initiatives** to promote **participation of women** either in employment force or as users.
- vii. Indicating the extent to which **women are engaged in decision-making** processes at various levels within the sector and in the organizations and initiating action to correct gender biases and imbalances.

These exercises can be commenced by each Ministry/Department of the Government, to start with, for a few select programmes/schemes which may be selected either in terms of their perceived gender impact, or the selection can be based on considerations of heaviest budget allocation. Based on the result of carrying out the above steps, the gender budgeting exercise may be institutionalized in the manner detailed in checklist.

5.17 Even in sectors like health and education, where there are specific programmes for women and girl children, care must be taken to ensure equitable distribution of services between men, women, girls and boys, by engendering all the schemes and programmes.

5.18 While, gender concerns in sectors like health and education are apparent what tends to be ignored is gender concerns in mainstream sectors like Finance, Energy, Transport,

Industries, etc. The Ministry of Women and Child Development lays emphasis on gender mainstreaming in all sectors.

In the year, 2009-10, the Ministry took up one-to-one interactions with the Ministry of Power (Box-10) and the Ministry of Urban Development. The Ministry also undertook gender analyses of Outcome Budgets of these Ministries/Departments, as well as budgets of some State Governments.

Box 10
Gender Budgeting in the Power Sector:

Some identified areas which could be further explored are:

- Involving women SHGs as franchisees for management of rural distribution of electricity, under the 'Rajiv Gandhi Grameen Vidyutikaran Yojana'.
- Engendering the process of rehabilitation of those displaced by large scale projects.
- Identifying the differential gender impacts of power distribution

Gender Budgeting Scheme

5.19 A Scheme for Gender Budgeting was included in 11th Plan and launched in the year 2008. Gender Budgeting programmes can be undertaken by the Ministry directly under the scheme or by Central/State Government

agencies, with financial assistance from the Ministry. Though an outlay of Rs 2.00 crores was allocated for the scheme for the year 2009-10, the Revised Estimate was brought down to Rs 0.50 crores.

