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Gender Budgeting and Its Implications for Feminist Research

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Abstract:

The two key themes underlying my study are gender budgeting and inter—disciplinary nature of feminist research. This paper examines how gender budgeting embodies many of the principles that feminists have advocated to highlight the marginalization of women. Gender Budgeting is one of the strategies that brings forth women’s marginalization in policy and it’s not the only one. One of the distinct features of the feminist methodology is its commitment to constant growth and its openness to multi-disciplinary work. Therefore, it is important to discuss how gender budgeting methodology brings out the multi-disciplinary nature of feminist research.

At this point I would like to discuss gender budgeting as an area of study. Gender Budgeting involves the analysis of policies for women’s empowerment. It looks at the differential thrust of macro-economic policies like the budgets. Budgets set in motion several social policies and programs which have the potential to change the lives of women and men. Policies are a reflection of the political will for transforming inequalities emerging from the power relations between women and men. A nation may claim that its priority is achieving gender equality and universal education, but the real test would lie in studying the efforts in achieving the same with the appropriate budget allocations. Efforts start with appropriate allocations at the centre and then it calls for effective implementation keeping in mind existing grassroots reality.



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Gender Mainstreaming of which gender budgeting is a sub-set gained prominence in the post-Beijing Declaration decade. In the context of Beijing declaration, gender mainstreaming came to be defined as the incorporation of gender perspective into all government policies, by the way of analysing the impact of those policies on both women and men (Clavero,2005: 11). Gender Budgeting is essentially concerned with gender mainstreaming in practice. It provides a means to assess gender differences and equality issues in both the planning and implementation of policies. As a part of a mainstreaming strategy it aims to ensure that general commitments to gender equality are reflected in the way in which resources are allocated and spent with the policy processes (Barry and Pillinger, 2005:73). The major driving force behind gender budgeting is the need to highlight the marginalization of women in policies. The discussion of gender budget methodologies will show how it cuts across disciplines and also how it amalgamates both the qualitative and quantitative approaches.

The Government of India has defined gender budgeting as:

Gender Budgeting refers to presentation of budgetary data in a manner so that the gender sensitivities of the budgetary allocations are clearly highlighted. It envisages highlighting the budgetary allocations not only to women-specific programmes but also to quantify pro-women allocations in the composite or gender-neutral programmes under various departments. Gender budgeting also involves carrying out an impact analysis of government programmes and its budgetary allocations on the overall socio-economic status of women in the country. The ultimate aim of gender analysis of national budgets is to incorporate gender variables into the models on which planning and budgeting is based (Report of the Expert Group On Classification System for Government Transactions, Ministry of Finance, India, 2004).

Traditionally, budgets are viewed as ‘gender neutral’, but in the garb is the non-recognition of the bias inherent in the budgetary process. This bias arises from the perception of women being dependents on men and not being ‘economic actors’; their work in the care economy being neglected and being seen as peripheral to the market economy. The ideological basis for the same is patriarchy. In a patriarchal society women are a ‘socially excluded’ (Sen, 1999) category. This reality impinges on all the economic, social and political institutions. Exclusion can be overt as reflected in staggering rates of crime against women or it can be covert as in the garb of gender neutrality in public policy. This exclusion is a serious impediment for capability formation amongst women and men. Gender Budgeting is being

recognized as one of the instruments of removing this social exclusion, but it is not the only one. Gender Budgeting provides a good illustration of the inter-disciplinary nature of feminist research. I would like to discuss what feminist praxis further in the next section.

Feminist Praxis

The first question one needs to clarify what is feminist praxis and how it is different from other research methods. Feminist methodological critiques have been made on several interrelated levels: philosophical, moral and practical. The *philosophical* level has involved a critique of positivism: the pretence of value free science and the presumption of objectivity conceived of as a set of procedures or an achievement rather than a process. On a moral level feminists have criticized the objectification of subjects and their exploitation by researchers using the dominant methods. The moral critique of research hierarchy is directly related to feminist's *practical* critique of the dominant methodologies. The opposed interests of researcher and researched in the dominant, hierarchical methodological approaches leads to distortions, lying, even farcical results (Gorelick, 1991). Reinharz (1992: 7) quotes the Australian scholar Dale Spender in her book *Feminist Methods in Social Research*:

At the core of feminist ideas is the crucial insight that there is no one truth, no one authority, and no one objective method which leads to the production of pure knowledge. This insight is as applicable to feminist knowledge as it is to patriarchal knowledge, but there is a significant difference between the two: feminist knowledge is based on the premise that the experience of all human beings is valid and must not be excluded from our understanding, whereas patriarchal knowledge is based on the premise that the experience of only half the human population needs to be taken into account and the resulting version can be imposed on the other hand. This is why patriarchal knowledge and the methods of producing it are a fundamental part of women's oppression and why patriarchal knowledge must be challenged – and overruled.

Cancian (2006) revises Cook and Fonow's categories which reflect the key features of feminist research methodology:

- 1) Gender and Inequality: feminist research is not value free or detached but is engaged to the moral commitment to do away with multiple structures of oppressions.
- 2) Experience: feminist research uses methodologies which validate the qualitative methodologies like ethnographies to validate the feelings of women's voices which have been neglected by traditional domains of research but qualitative data can support inequality just like quantitative methods.
- 3) Action: feminist research includes an action or policy component aimed at social transformation or simply improving the conditions of particular women; the goal is often stated as 'doing research for women', policy recommendations aimed at politicians or social movement's activists are another form of action.
- 4) Critique of research: feminist research, which originated in opposition traditional social science, continues to take a reflexive, critical stance, questioning the conventional assumptions of feminists and non feminists and analyzing how the research process is shaped by the gender, race, class and sexual orientation of the researcher and by the broader social and cultural context.
- 5) Participatory methods: Feminist tends to reject a rigid separation between researchers and the researched and favour methods that give research more power. For example: two way interactive interviews may be used instead of the traditional method in which the interviewer asks all the questions.

The three key features of the feminist research that emerge from the theory are as follows: value-ladenness- an explicit commitment to gender justice; action orientation – all research with women should lead to a positive change in their lives and the researcher is herself/himself engaged with the struggle against oppression.

I view gender budgeting as a broad framework defining methodologies for the gender analysis of public policies. It embodies a systems approach implying that is any macro level initiative has a micro-level impact and vice-versa. Gender Budgeting aims at a more effective

targeting of public expenditure. Budget analysis has significant implications for the feminists, as budget is an integral part of the planning process. Feminism critiques planning, but planning concretizes many of the feminist concerns as both are guided by the principle of changing society. Gender budgeting embraces methodologies which are inter-disciplinary in nature and also one has the scope to explore methodological triangulation. The critical concern underlying gender budgeting as in any feminist research is the commitment to change.

Box 1: Different Types of Government Gender Sensitive Expenditures

Gender Specific Expenditures: These are allocations to programs that are specifically targeted to groups of women, men, boys or girls, such as programs on men's health (e.g. prostate cancer) or violence against women.

Expenditures that promote gender equality within the public services: These are allocations for equal employment opportunities, such as programs that promote representation of women in management and decision making across all occupational groups, as well as equitable pay and conditions of service. This is distinct from programs that promote employment of equal numbers of men and women, as having equal numbers of men and women does not prevent a situation where, for example: with 100 employees, the 50 men are managers and 50 women are secretaries.

General and Mainstream expenditure: These are allocations that are not in the two categories above.

Gender Impact Analysis of these expenditures focuses on the differential impact of the sectoral allocations on women and men, boys and girls. Although the analysis is challenging due to the lack of gender disaggregated data¹, in many instances, these expenditures also are the

¹ Identifying and generating gender statistics is a complex process, which extends beyond the simple disaggregation of indicators into the categories of men and women. Gender disaggregated data focus on issues of particular relevance to women and men, girls and boys and their different roles and positions in society. Statistics on

most critical because more than 99 percent of government expenditure usually falls into this category

Source: Elson, 1999

Analytical Tools of Gender Sensitive Budgeting

Gender Aware Sectoral Policy Evaluations- budgets must follow policy then gender aware policy appraisal offers a means of identifying policy gaps and limitations as well as the adequacy of allied resource allocations. A gender aware policy appraisal makes a strong link between policy and resource allocation. The techniques which can be used for this analysis include evaluation of the policy against its aims and performance objectives and discussion of events, activities and associated budget allocations generated by the policy (Budlender, Sharp and Allen, 1998:38). This may involve studying the statistics and deducing the causal relationship between variables. One has to relate the policy to the ground reality. This calls for the use of qualitative methodologies like document analysis etc.

Gender Disaggregated Benefit Incidence Analysis of Public Expenditure- is carried out to examine the extent to which women-men and girls/boys benefit from expenditure on public services. This tool requires considerable amounts of quantitative data for estimating both the unit cost of providing a particular government service and the utilisation of public expenditure by households or individuals disaggregated by gender. This is largely a quantitative method; it

household distance from water and fuel for example: have different implications for women and men since it is the usually the former who spend the time collecting these necessities where they are readily available.

highlights how certain forms of expenditure like expenditure on higher education is likely to bring benefits to women or men.

Gender Disaggregated Beneficiary Assessments- are done to examine priorities of potential/actual beneficiaries regarding public services and spending. This involves asking citizens their views on delivery of public services and their needs as they perceive them. One can use quantitative survey like opinion polls and attitude surveys etc or qualitative processes like focus groups, interviews, participant observations etc (Budlender, Sharp and Allen, 1998:38).

Gender Disaggregated Revenue Incidence Analysis calculates the relative amount of direct and indirect taxes and user fees. This needs data from income and expenditure patterns. This may demonstrate how women may not be paying high levels of direct taxes but will be paying higher indirect taxes (Budlender, Sharp and Allen, 1998:38)

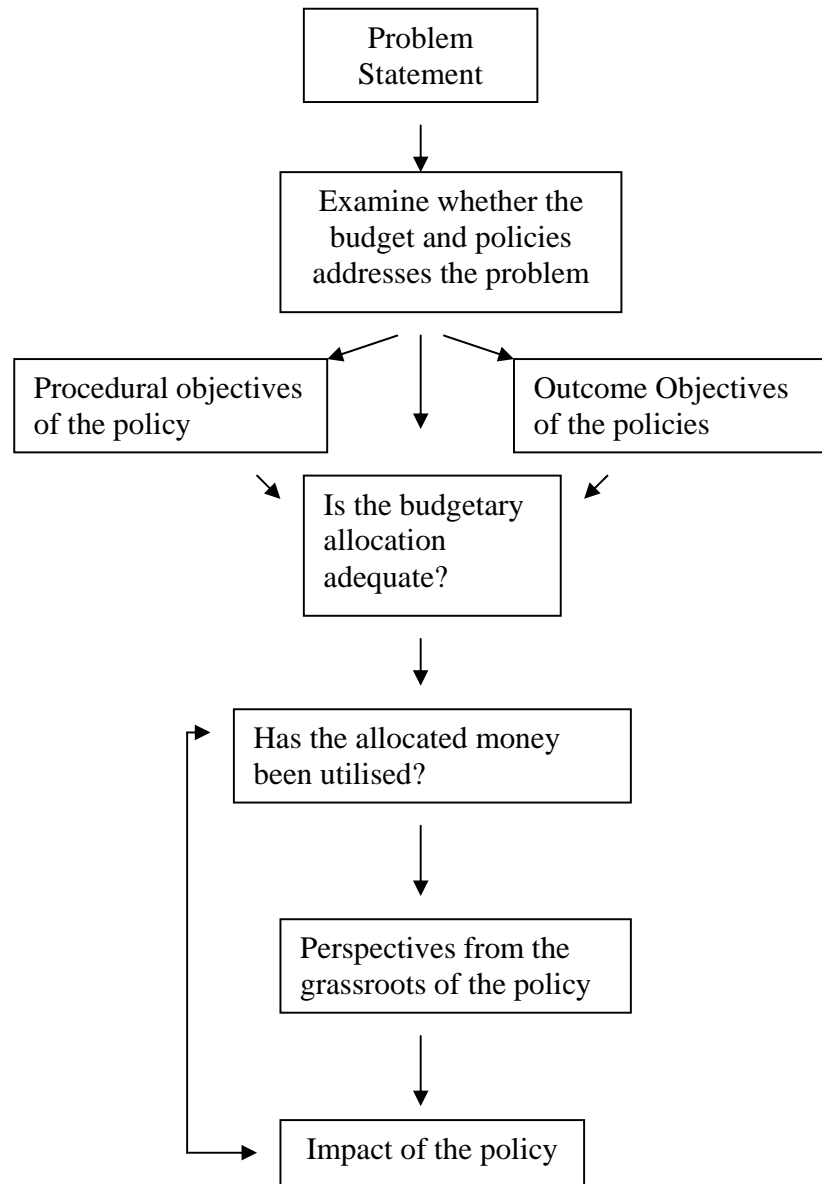
Gender-Disaggregated Analysis of Impact of Budget on Time Use makes visible the relationship between national budgets and the care economy. The methods used include household time-use surveys; calculation of time spent on paid and unpaid work, and gross household product; mapping of changes in private and public services and expenditures.

Gender Responsive Medium Term Macroeconomic Policy Framework disaggregates existing variables by gender, introduces new variables and constructs new models incorporating both national and household income accounts reflecting unpaid work.

Case-Study of *Sarva Shiksha Abhiyan*, India

Gender Budgeting demonstrates the use of multiple methodologies for highlighting the discrimination of women in public policies. The quantitative methods can present a macro picture of women's marginalization in public policy. The qualitative methods can present the needs of women and men and their needs.

I did a study on Gender Budgeting and *Sarva Shiksha Abhiyan*, an educational program in India. It was multi-layered study, using both quantitative and qualitative methods. The study examined the inter-state differences in the allocations and utilization of funds for the program which has a significant pro-woman allocation. Further, a survey was conducted in Mumbai to analyze the implementation of the program at the grassroots level. The study used both quantitative and qualitative methods like interviews and focus group discussions. Some basic tools for statistical analysis have been used like bi-variate correlation, cross tabulation, percentages and pie-charts. The study concluded with the following findings: first and foremost, the governmental commitment to achieve gender equality in the policy documents is far from being satisfactory. Furthermore, there is inadequate utilization of funds ear-marked for the program and the implementation of the program at the grassroots deserves much more attention. Even if the education program brings girls in to mainstream education they may drop-out for reasons like teacher's attitude, poverty, migration etc. The findings suggested that gender budgeting exercise can present the failures at multiple levels to achieve women's empowerment.



Conclusion

The basic premise underlying the feminist research is the commitment to highlight gender discrimination in society. One can clearly see the application of feminist principles in gender budgeting. Gender budgeting is an outcome of years of struggle of feminist development workers to highlight women's marginalization in policies. It reflects the success of feminists in moving beyond the boundaries of puritan research practices.

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