CHAPTER -3

GENDER INEQUALITY AND ITS MEASUREMENT

3.1 Introduction
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CHAPTER - 3

GENDER INEQUALITY AND ITS MEASUREMENT

1.1. Introduction:-

Here I am present the reasons behind existence of GDI. The actual term ‘Gender Related Development Index’ is used in its abbreviation GDI. We know by now (covered largely under chapter 1 & 2) that the development started with HDI (Human Development Index) that covered (1) “A Long and Healthy life”, as measured by Life Expectancy at Birth, 2) “Knowledge” as measured by the Adult Literacy Rate and Combined Primary, Secondary and Tertiary Gross Enrolment Ratio, and 3) “A decent standard of living”, as measured by “Estimated Earned Income” in Purchasing Power Parity (PPP) US$.

The further development over HDI resulted into birth of GDI that has considered ‘gender’ development, primarily women development & its state in all the countries of the world.

3.2. Importance of Gender –Related Development Index:-

We know that HDI is used to know human development in general. HDI, without any doubt has been a great development as prior to that human capital was neglected and hence human contributions was not given due attention. However, HDI brought this to the notice of the world that along with material wealth, human capital needs to be given due respect.

During the development work, it was observed that women development was not given due place in the total development of any economy. Hence majority of the women population remained underdeveloped. It was necessary to improve the state of women with respect to health, education and earning of women to achieve balanced economic growth. This compelled economists to look for a proper index. GDI thus came into existence.

GDI is now used as a major tool for policy decisions by economic experts and governments. It has achieved great importance all over the world. Here is an extract from the information available about GDI.
“The gender-related development index (GDI) measures achievement in the same basic capabilities as the HDI does, but takes note of inequality in achievement between women and men. The methodology used imposes a penalty for inequality, such that the GDI falls when the achievement levels of both women and men in a country go down or when the disparity between their achievements increases. The greater the gender disparity in basic capabilities, the lower a country's GDI compared with its HDI. The GDI is simply the HDI discounted, or adjusted downwards, for gender inequality.” (Ref: HDR -1995, p. 73, Box 3.1)

3.1.1 From this extract we understand:
1. That the indices used in HDI the same as used for GDI.
2. GDI more focuses on inequality of achievements by men and women
3. Gender disparity has inverse relationship with GDI achievements. The Lower the disparity, the higher is the GDI and vice versa.

3.1.2 GDI importance in nut shell can be understood as follows:
1. It gives relative levels of progress (including backwardness) of women’s physical, political, economical and social conditions.
2. This is across the world. That means all countries are covered under GDI.
3. UNDP has taken into consideration women’s survival, safety, health, education, decision making, gender empowerment, inequality between men and women at different levels to arrive at a proper index to compare the disparities and suggest corrective actions for policy makers.
4. Objective of GDI is to generate important and specific set of information that can be used for identification and intervention for correcting the status of women at different levels.
5. It is very easy from GDI to compare the status of women in other different countries. This can be understood from Annual Reports published by UNDP.
6. It helps government to for making policies and plans, to enact laws for lesser disparities between achievements of men and women.
7. There is a good deal of information now available and it has been resulting into gradual improvement in gender development across the world.
3.3.3 GDI & HDI Goal Post:

The Goal post refers to the target indicators for better achievement and provides guidelines for further development. Following tables give an idea of how the goal post looks like.

**Goal Posts for HDI and GDI**

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Maximum</th>
<th>Minimum</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A Long and Healthy Life</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Infant Mortality Rate</td>
<td>105 per 1000 live births</td>
<td>0 per 1000 live birth</td>
</tr>
<tr>
<td>Life Expectancy at age 1 for HDI</td>
<td>85 years</td>
<td>25 years</td>
</tr>
<tr>
<td>Life Expectancy at age 1 for GDI</td>
<td>87.5 years for Females</td>
<td>27.5 years for Females</td>
</tr>
<tr>
<td></td>
<td>82.5 years for Males</td>
<td>22.5 years for Males</td>
</tr>
<tr>
<td><strong>Knowledge</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7+ Literacy Rate</td>
<td>100 Percent</td>
<td>0 Percent</td>
</tr>
<tr>
<td>Mean Years of Education for 15+ age group</td>
<td>25 Years</td>
<td>1 Years</td>
</tr>
<tr>
<td><strong>A Decent Standard of Living</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female / Male Estimated Earned Income Share Per Capita Per Annum</td>
<td>Rs. 1,50,000</td>
<td>Rs. 100</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dimensions / Indicators</th>
<th>Weights</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Dimension 1: ‘A Long and Health Life’</strong></td>
<td>One – third</td>
</tr>
<tr>
<td>Infant Mortality Rate</td>
<td></td>
</tr>
<tr>
<td>Life Expectancy at age 1</td>
<td>Half for each indicator within the dimension</td>
</tr>
<tr>
<td><strong>Dimension 2: ‘Knowledge’</strong></td>
<td>One – third</td>
</tr>
<tr>
<td>7+ Literacy Rate</td>
<td>Two thirds within the dimension</td>
</tr>
<tr>
<td>Mean Years of Education for 15+ age group</td>
<td>One – thirds within the dimension</td>
</tr>
<tr>
<td><strong>Dimension 3: ‘A Decent Standard of Living’</strong></td>
<td>One third</td>
</tr>
<tr>
<td>Female / Male Estimated Earned Income Share Per Capita Per Annum</td>
<td></td>
</tr>
</tbody>
</table>

Source: “Gendering Human Development Indices: recasting the Gender Development Index & Gender Empowerment Measure for India, Summary Report”, Ministry of Women & Child Development Govt. of India 2009” (page no. - 6)
1.3. Gender Empowerment Measure (GEM):

Before we go into details of this section, it is imperative on my part to give some basic terminology used in measurement of gender and gender empowerment.

Indicators: Indicators are criteria or measures against which changes can be assessed. They may be pointers, facts, numbers, opinions or perceptions – used to signify changes in specific conditions or progress towards particular objectives (CIDA, 1997).

1. ‘Gender-responsive’, ‘gender-sensitive’, or just ‘gender’ indicator measures gender-related changes over time.
2. Gender indicators can refer to quantitative as well as qualitative indicators.
3. Example of quantitative indicators is literacy rate.
4. Example of qualitative indicator is increased in women’s levels of empowerment or in attitude changes about gender equality.
5. 3 important reasons why indicators are used:
   (a) to prioritize & to act as an evidence to take make the case for gender issues to be taken seriously
   (b) to help to make better planning and actions and
   (c) to hold institutions accountable for their commitment on gender equality.

1.3.1. Now let us get into detailing of GEM:

GEM is the part of GDI. It is important for us to know the meaning of ‘empowerment’ first before we precede in detail the topic.

The Empowerment is described under GDI as ‘People fully participating in the decisions and processes that shape their lives’. Hence GEM focuses on participation of women in economic, professional and political fields. Based on degree of participation, the state of current level of empowerment can be concluded. Hence, if there is improvement in empowerment in political field it will mean that the number of females participating in politics has improved, there are more number of women ministers in the government structure etc. Similarly for professional indicator, how many women are employed in various sectors & posts in the sectors give us clear picture of empowerment.
UNDP introduced GDI and Gender Empowerment Index in 1995. It aimed at finding out gaps in real situations in various developments and empowerments in the world, mainly in the third world. HDR already pointed out that status of women is closely associated with their participation in decision making. The degree of participation or the extent to which women participate in socio, economic and political sectors is known as GEM. Just to understand this in Indian context, GEM is at 19% here. That means women contribute just 19% of national income in India. Naturally, this participation is in comparison with participation of males in national income, of that particular country.

GEM also indicates access of women to basic needs does not necessarily mean empowerment. To promote the empowerment of women, UNDP has proposed following measures:

- Promotion of women in policy and decision-making processes and positions
- Emphasizing women’s income-generating activities
- Providing women with access to empowering facilities (such as education, orientation and training of all kinds).

To gain more information about GEM, I have collected following key indicators considered under GEM.

❖ **GEM Dimension 1 - Political Participation and Decision-making Power’**
- % Share of Parliamentary Seats (elected)
- % Share of Seats in Legislature (elected)
- % Share of Seats in Zilla Parishads (elected)
- % Share of Seats in Gram Panchayats (elected)
- % Candidates in Electoral Process in National Parties in the Parliamentary election
- % Electors Exercising the Right to Vote in the Parliamentary election.

❖ **GEM Dimension 2: ‘Economic Participation and Decision-making Power’**
- % Share of officials in service in Indian Administrative Service, Indian Police Service and Indian Forest Service
- % Share of enrolment in medical and engineering colleges.
GEM Dimension 3: ‘Power over Economic Resources’
- % Female/Male with Operational Land Holdings
- % Females/Males with Bank Accounts in Scheduled Commercial Banks (with credit limit above Rs. 2 lakh)
- Share of Female/Male Estimated Earned Income Share per capita per annum.

(Source: - Gendering Human Development Indices: Recasting the GDI & GEM for India, Summary Report, Ministry of Women & Child Development, Govt. of India, 2009, Page No. 4)

1.3.2. GEM – Some Facts (World)
1. As mentioned earlier that just taking care of basic needs of women does not make any difference to the total participation of women in national income. The study of the data shows that there are number of developed countries that have very low GEM values when compared with GDI values. These countries include France, Japan, Greece, UK, Ireland and Spain.
2. Developing countries with low GEM values in comparison with GDI values are Republic of Korea, Turkey, Kuwait, UAE and Mauritius.
3. This is revealed by the fact that a number of countries have very low GEM values compared with their GDI values. These include France, Japan and Greece, United Kingdom, Ireland and Spain. Developing countries with very low GEM values compared to their GDI values include the Republic of Korea, Turkey, Kuwait and the United Arab Emirates and Mauritius.

3.3.3. GEM – Some Facts (India)
1. Government of India established the Ministry of Women & Child Development (MWCD) to carry on programs based on findings of GDI and GEM. UNDP supports these programs technically as well as with financial support. This is done under the title `Promoting Gender Equality`.
2. Collaboration has been done with Indian Institute of Public Administration (IIPA), Delhi for technical support.
3. A `Technical Advisory Committee` (TAC) was constituted in January 2007 by MWCD. The members are representatives from the Ministry of Statistics and program implementation, Social sector ministers, few women economists who have worked with UNDP and on the indicators in 1996.
3.3.4. GEM – Some more information & Statistical data

Women empowerment measures undertaken in different Five Year Plans by government of India

<table>
<thead>
<tr>
<th>Five Year Plans</th>
<th>Women Welfare Measures formulated by government of India</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Five Year Plan</td>
<td>Central social welfare board was set up 1953. It was mainly welfare oriented as far as women's issues were concerned. The Central Social Welfare Board (CSWB) undertook a number of welfare measures through the voluntary sector. The programmes for women were implemented through the National Extension Service Programmes through Community Development Blocks.</td>
</tr>
<tr>
<td>(1951-56)</td>
<td></td>
</tr>
<tr>
<td>Second Five Year Plan</td>
<td>Mahila Mandals were organized. Efforts were geared to organise &quot;Mahila Mandals&quot; (women's groups) at grass-roots levels to ensure better implementation of welfare schemes.</td>
</tr>
<tr>
<td>(1956-61)</td>
<td></td>
</tr>
<tr>
<td>Third Five Year Plan</td>
<td>Priority for education of women. They accorded high priority to women's education</td>
</tr>
<tr>
<td>(1961-1966)</td>
<td></td>
</tr>
<tr>
<td>Fourth Five Year Plan</td>
<td>Supplementary nutrition’s for women &amp; children. Measures to improve maternal and child health services, and supplementary feeding for children, nursing and expectant mothers were also introduced.</td>
</tr>
<tr>
<td>(1966-1971)</td>
<td></td>
</tr>
<tr>
<td>Fifth Five Year Plan</td>
<td>Shift from women’s welfare to women’s development</td>
</tr>
<tr>
<td>(1971-1980)</td>
<td></td>
</tr>
<tr>
<td>Sixth Five Year Plan</td>
<td>Separate chapter on women &amp; adoption of a multidisciplinary approach with thrust on health, education &amp; employment</td>
</tr>
<tr>
<td>(1980-85)</td>
<td></td>
</tr>
<tr>
<td>Seventh Five Year Plan</td>
<td>Raise social &amp; economic status of women, a separate development for women &amp; child development under HRD ministry created</td>
</tr>
<tr>
<td>(1985-90)</td>
<td></td>
</tr>
</tbody>
</table>
Eighth Five Year Plan (1992-97): Shift from women’s development to women’s empowerment.

Ninth Five Year Plan (1997-2000): Vigorous steps on economic empowerment of women by launching DWACRA, STEP etc.

Tenth Five Year Plan (2000-2007): Promote access of women to information, resources & services.

Eleventh Five Year Plan (2007-2012): For the first time in the history of Indian planning there is an attempt to move beyond empowerment and recognize women as agents of sustained socio-economic growth and change.

Twelfth Five Year Plan (2012-2017): The focus of the XII Plan would thus be on enhancing employability of women through skill development.

Source: 1) Himachal Pradesh Development Report, Chapter no. 10 “Gender Empowerment” (Page No. 193)
2) Eleventh Five Year Plan 2007-12, Volume I, Inclusive growth, Planning Commission Government of India

Table 3.1

<table>
<thead>
<tr>
<th>Area</th>
<th>1996</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>0.391</td>
<td>0.492</td>
</tr>
<tr>
<td>Least Developed Counties</td>
<td>0.269</td>
<td>0.594</td>
</tr>
<tr>
<td>Industrial Countries</td>
<td>0.569</td>
<td></td>
</tr>
<tr>
<td>India</td>
<td>0.235 Rank -93</td>
<td>0.617</td>
</tr>
</tbody>
</table>


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3.4. Gender Inequality Index (G.I.I.):-

`Gender Inequality` is exactly opposite to gender equality. Gender equality denotes equal opportunities for women in their life as men, including the ability to participate in private and public life.

Inequality means `not equal`. Hence, gender inequality is denial of equal opportunities of development or progress to women as enjoyed by men.

1.4.1. Here are some features of G.I.I:

1. The `Gender Inequality Index` was introduced in 2010 as a part of 20\textsuperscript{th} anniversary edition of HDI.

2. It is concerned with discrimination between men and women in personal, social and professional life.

3. In 2010 HDR introduced the Gender Inequality Index (GII) for 138 Countries, in 2011 for 146 Countries and in 2012 for 132 Countries.

4. The Gender Inequality Index (GII) reflects women’s disadvantage in three dimensions such as:

   a) **Reproductive Health** – (I) Adolescent Mortality

      (II) Maternal Mortality

   b) **Empowerment** -

      (I) Educational Attainment -

      Secondary level & above,

      (II) Primarily Representation

   c) **The labour Market** -

      (I) Labour Force Participation

5. **GII** shows loss in human development due `inequality` that exists in the society.

6. **GII** range is 0 to 1. `0` indicates that women and men are fare equally. `1` indicates the opposite that is men and women and not fare equally.

7. **GII** value and achievement have inverse relationship. A high GII value indicates lower achievement and vice versa.

8. **GII** provides insights into gender disparities in health, empowerment and labor market in 148 countries.
Box 1: Understanding Gender Equality

"Gender equality does not imply that all women and men must be the same. Instead, it entails equipping both with equal access to capabilities; so that they have the freedom to choose opportunities that improve their lives. It means that women have equal access to resources and rights as men, and vice versa".

(Source: Power, Voice and Rights 2010, Asia Pacific Human Development Report, UNDP)

1.4.2. GII - Data and its interpretation (selected countries):

I am reproducing here the table (appeared in Chapter 2) with respect to GII along with its interpretation.

Table below provides summary of GII of the world and its comparison with India.

<table>
<thead>
<tr>
<th>Area</th>
<th>2011</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>0.492</td>
<td>0.463</td>
</tr>
<tr>
<td>Least Developed Counties</td>
<td>0.594</td>
<td>0.566</td>
</tr>
<tr>
<td>India</td>
<td>0.617 Rank 129</td>
<td>0.610 Rank - 132</td>
</tr>
</tbody>
</table>

Source: - HDR – 2011 2013

Interpretation:

1. World GII which was 0.492 in 2011 declined to 0.463. As per value relation with achievement, in 2013 world GII shows improvement in inequality state all over the world.
2. Same is with least developed countries. There is slightly better performance in 2013 over 2011.
3. India stands very low with respect to achievement in GII, though these a very slight improvement of 0.007 points in the GII performance. However, India is far off from world GII achievement levels.
Table 3.3

Below provides data of some selected countries:

<table>
<thead>
<tr>
<th>Country</th>
<th>Gender Inequality Index</th>
<th>2008</th>
<th>Rank</th>
<th>2011</th>
<th>Rank</th>
<th>2012</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td></td>
<td>0.560</td>
<td>-</td>
<td>0.492</td>
<td>-</td>
<td>0.463</td>
<td>-</td>
</tr>
<tr>
<td><strong>High Human Development</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sweden</td>
<td>0.212</td>
<td>3</td>
<td>0.049</td>
<td>1</td>
<td>0.055</td>
<td>2</td>
<td>-</td>
</tr>
<tr>
<td>Netherland</td>
<td>0.174</td>
<td>1</td>
<td>0.052</td>
<td>2</td>
<td>0.045</td>
<td>1</td>
<td>-</td>
</tr>
<tr>
<td>Norway</td>
<td>0.234</td>
<td>5</td>
<td>0.075</td>
<td>6</td>
<td>0.065</td>
<td>5</td>
<td>-</td>
</tr>
<tr>
<td>Canada</td>
<td>0.289</td>
<td>16</td>
<td>0.209</td>
<td>35</td>
<td>0.119</td>
<td>18</td>
<td>-</td>
</tr>
<tr>
<td>Japan</td>
<td>0.273</td>
<td>12</td>
<td>0.123</td>
<td>14</td>
<td>0.131</td>
<td>21</td>
<td>-</td>
</tr>
<tr>
<td>New Zealand</td>
<td>0.320</td>
<td>25</td>
<td>0.195</td>
<td>32</td>
<td>0.164</td>
<td>31</td>
<td>-</td>
</tr>
<tr>
<td>Switzerland</td>
<td>0.228</td>
<td>4</td>
<td>0.067</td>
<td>4</td>
<td>0.057</td>
<td>3</td>
<td>-</td>
</tr>
<tr>
<td><strong>Medium Human Development</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sir Lanka</td>
<td>0.599</td>
<td>72</td>
<td>0.419</td>
<td>74</td>
<td>0.402</td>
<td>75</td>
<td>-</td>
</tr>
<tr>
<td>Philippines</td>
<td>0.623</td>
<td>78</td>
<td>0.427</td>
<td>75</td>
<td>0.418</td>
<td>77</td>
<td>-</td>
</tr>
<tr>
<td>China</td>
<td>0.405</td>
<td>38</td>
<td>0.209</td>
<td>35</td>
<td>0.213</td>
<td>35</td>
<td>-</td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>0.705</td>
<td>105</td>
<td>0.583</td>
<td>118</td>
<td>0.544</td>
<td>116</td>
<td>-</td>
</tr>
<tr>
<td>Viet Nam</td>
<td>0.530</td>
<td>58</td>
<td>0.305</td>
<td>48</td>
<td>0.299</td>
<td>48</td>
<td>-</td>
</tr>
<tr>
<td><strong>Low Human Development</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pakistan</td>
<td>0.721</td>
<td>112</td>
<td>0.573</td>
<td>115</td>
<td>0.567</td>
<td>123</td>
<td>-</td>
</tr>
<tr>
<td>India</td>
<td>0.748</td>
<td>122</td>
<td>0.617</td>
<td>129</td>
<td>0.610</td>
<td>132</td>
<td>-</td>
</tr>
<tr>
<td>Kenya</td>
<td>0.738</td>
<td>117</td>
<td>0.627</td>
<td>130</td>
<td>0.608</td>
<td>130</td>
<td>-</td>
</tr>
<tr>
<td>Bangladesh</td>
<td>0.734</td>
<td>116</td>
<td>0.550</td>
<td>112</td>
<td>0.518</td>
<td>111</td>
<td>-</td>
</tr>
<tr>
<td>Bhutan</td>
<td>-</td>
<td>-</td>
<td>0.495</td>
<td>98</td>
<td>0.464</td>
<td>92</td>
<td>-</td>
</tr>
<tr>
<td>Yemen</td>
<td>0.853</td>
<td>138</td>
<td>0.769</td>
<td>146</td>
<td>0.747</td>
<td>148</td>
<td>-</td>
</tr>
</tbody>
</table>


**Interpretation:**

1. Table clearly provides for a vast difference between GII achievement of high, medium and low achieving nations.
2. It clearly marks out difference between developed and other countries.
3. Netherland & Sweden clearly stand as role models in terms of GII with the rank 1 & 2, replaced in 2012.
9. This means in these countries the gender disparities in health, empowerment and labor market are almost do not exist. They stand high in comparison with 148 countries in the world.

4. If we take a look at medium human development countries, we see a drastic improvement in GII of three countries in the given table; they are China (From 0.405 in 2008 to 0.213 in 2012), Zimbabwe (from 0.705 in 2008 to 0.544 in 2012) and Vietnam (0.530 in 2008 to 0.299 in 2012). Vietnam stands number 1st in terms of faster actions against inequalities, which is quite remarkable. Same is with Zimbabwe, because the country is out of shape economically, however, their GII is much stronger.

5. It is matter of concern for India as it comes under low human development and the GII index is also significantly lower in comparison with same sized country China. India is nowhere near China with respect to GII. Countries like Kenya, Bangladesh, Pakistan and Bhutan have outperformed India in GII; though in comparison with 2008 (with GII value of 0.748) India has seen significant improvement in 2012 (with GII value of 0.610). It shows that India has large scope with respect to gender inequality issues that is the gender disparities in health, empowerment and labor market.

6. It is a matter of shame for this country (India) which ranks 132nd in 148 countries denoting the pathetic condition of women in all sectors of development & Indian society is still a male dominant one.

3.4.3. Suggestions to correct the imbalance:
1. Expand economic opportunities for women.
2. Strengthen the role of women in governance
3. Address the much neglected area of violence against women and children.
4. Effect changes in mind sets that perpetuate anti female biases.
5. Expand access to quality reproductive health services for women, more especially adolescent girls.
6. Demand better gender disaggregated data for monitoring progress and concentrates more on expanding opportunities for the girl child in the most disadvantaged communities.
3.5. Gender Budgeting (GB):-

Following lines give clear idea of importance of a government budget:

‘Budgets matter because they determine how governments mobilize and allocate public resources. Budgets are used to shape policies, set priorities and provide the means to meet the social and economic needs of citizens.’ —Noeleen Heyzer, UNIFEM

"If you want to see which way a country is headed, look at the country’s budget and how it allocates resources for women and children”(Pregs Govender, MP, South Africa)

3.5.1. The purpose of GB:

1) Supporting to gender mainstreaming in macro economics.
2) Strengthening the civil society participation in economic policy making.
3) Enhancing the linkages between economic & social policy outcomes.
4) Tracking public expenditure against gender & development policy commitments.
5) Contributing to the attainment of the Millennium Development Goals (MDGs).
6) Addressing gap between policy commitment & allocation for women through adequate resource allocation & gender sensitive programme formulation implementation.
7) Mainstreaming gender concerns in public expenditure & policy.
8) Gender audit expenditure programme implementation & policies relating to public expenditure, fiscal & monetary matters etc.

3.5.2. Here are some points related with gender budgeting (GB) in the world & in India:

1. GB is systematic examination of budget programs & policies with respect to women development.
2. Australia is the first country to introduce GB formally under ‘Women’s budget’. This is mainly to address the issue of gender inequality. This was done in 1984.
4. By 2002, the number of countries accepting GB and incorporating it in their budget system is 60. These countries are as follow :-

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Source: - Gender Budgeting Handbook for Government of India Ministries and Departments

5. In India the process started in 2003 with the study done by Ashok Lahiri, Chakraborty and Bhattacharyya of National Institute of Public Finance and Policy. (Source: - “Gender Responsive Budgeting and Fiscal Decentralisation in India: A Preliminary Appraisal”, Lekha S. Chakraborty)
6. In India GB was introduced in Union Budget from 2005-06 onwards. The
Expenditure Budget, Volume I, 2005-06, for the first time, included a statement
on Gender Budgeting (Statement 19).
7. The areas considered for providing budget are 1) Health 2) Family Welfare 3)
Elementary Education and Literacy 4) Labour and Employment 5) Rural
Development 6) Social Justice and Empowerment 7) Tribal Affairs 8) Urban
Employment and 9) Poverty Alleviation and Small Scale Industries.
8. The gender budgeting statement presented in Union Budget 2006-07 has two
parts (Part A and Part B).
9. **Part A** – has schemes where 100 % allocations are meant exclusively for the
benefit of women.
10. **Part B** - has schemes where the allocations for women constitute at least 30
percent of the provisions.
11. GB provides a range of methodologies for analysis of expenditure and revenue
streams by gender, enabling policy makers, analysts and governments to
understand any differential impacts on men and women of policy decisions.

We can get a clear idea of the importance now given to gender budgeting
across the world. GB is a tool now to promote equality & empowerment for women.
It has been helping planning and implementation of what is planned. The related
departments are made responsible to share and to provide an analysis of the impact of
GB.

GB is known by three titles in general. They are (1) Gender Budget (2) Gender
Sensitive Budget (3) Women’s budget. These different heads are mainly to check /
audit the impact of budget on the ground on women development (equality). They act
as tools to facilitate assessments. Following statements will make these concepts more

**“It is important to recognize that ‘Women’s Budgets’ or ‘Gender Sensitive
Budget’ is not separate budgets for women or for men. They are attempts to
breakdown, or disaggregate the government mainstream budget according to its
impact on women & men & different groups of women & men; with cognizance being
given to the society’s underpinning gender relations”**. (Sharp, Rhonda” 1999)

**“Gender Budget initiatives analyze how governments raise & spend public
money. With the aim of securing gender equality in decision making about public
resource allocation & gender equality in the distribution of the impact of government**
Some more light on Gender Responsive budgeting

The above diagram shows that Gender Responsive budgeting is not only beneficial to females but also to males and to the whole system, as it takes the holistic picture of society and incorporates the element of gender equity, gender equality, poverty alleviation, good governance, accountability, transefarency and thus leads to economic efficacy. (http://www.monitor.upeace.org/innerpg.cfm?id_article=932) (Source: - Dr. Shahbaz Israr Khan, (August 24, 2012) “Gender Responsive Budgeting Initiative (GRBI) in Pakistan: Needs, Initiatives and Challenges - A Contextual Analysis”)

3.5.3. Some additional points that are considered in GB:-

1) Gender Budgeting refers to the process of conceiving planning, approving executing, monitoring, analyzing & auditing budgets in a gender sensitive way.

2) Actual expenditure & revenue (usually of the government) analysis include on women & girls as compared to men & boys.

3) Gender Budgeting is helpful to government to decide that how policies to be made adjusted & reprioritized.

4) It is a way of linking gender equality policy with macroeconomic policy.

5) It applies to the revenue raising side as well as the expenditure side of the budget.
6) It is a way of expediting gender mainstreaming.

3.5.4 Following points not considered in gender budgeting:-

1) Gender budget is not separate budget for women & men.
2) Gender budget does not divide total budget into two parts like 50% for allocation for men and 50% for women.
3) Gender budget does not always indicate an increase in the allocations for women. It is about prioritizing also.
4) Gender budgeting is not only for government budgets. It can be extended to the budget of public & private sectors, units, institutions, civil society, organizations, NGO’s etc. It can be made gender responsive as well.

3.5.5 Why should gender budgeting focus on women?-

1) 49% women’s population exists in the world & their development cannot be neglected.
2) Near 2/3 of women are illiterate in the world. It is necessary to make them literate.
3) Women are facing maternal mortality in developing & underdeveloped countries. The maternal mortality should eradicate at grassroots.
4) A woman has almost no right in decision making in both government & corporate sector. Especially at senior level, the participation is very low.
5) Women’s economic, political status is not as good as men. She is always engaged in household works. They don’t have feel security in politics and at high level post.
6) Women are always working in different works and get money including household work but their money or earning does not include in National Income. They should include women’s money in national income.
7) Women also continue works more & engage mostly in unpaid work such as bearing, rearing & caring for children & other members of the families. They should get an opportunity to do work in government and industrial sectors for making the position in different fields and make them independent and enable for fitting against discriminations, violence and poverty.
8) Over all, for improving the status of women in various areas and for make enable, budget is necessary for achieving the skills, education, get write constitutional information and vanish poverty, illiteracy, discrimination, violence etc.

3.5.6 Benefits of G.B:

Gender budget can be very effective in reducing the gender discrimination & addressing to socio-economic discrimination against women because-

1) The first and important benefit is that GB ensures focused plan of development for women by taking priorities into consideration.

2) Sufficient fund allocation ensures implementation of plans.

3) Comparison between two financial years in two developmental plans & between two different countries with respect to status of women can be done through GB achievements.

4) GB also builds confidence in women in the government and shares better respect & dignity for them.

3.5.7 Strategic Framework of GB:-

Strategic framework deals with quantification of allocation of resources in three layers of budgetary exercise viz central, state and local governments. This ensures planned expenditure at these 3 levels. Other elements of the strategic framework are as given below.

3.5.7 “Budgeting for Gender Equity”: Strategic Framework of Activities

A) Refining and standardizing methodology and development of tools.

a) Trend analysis

b) Analysis of change in pattern, shift in priorities in allocation across clusters of services etc.

c) Variations in allocation of resources and actual expenditure

d) Adherence to physical targets

e) Gender audit of policies of the Government – monetary, fiscal, trade etc. – at the Centre and State levels
f) Research and micro studied to guide macro policies like credit policy, taxes etc.
g) Identification of gender impact of policies / interventions viewed as gender neutral
h) Micro studies to identify need for affirmative action in favors of women towards correcting gender imbalances
i) Impact assessment of various schemes in the Union and State budgets
j) Micro studies on incidence of benefits
k) Analysis of cost of delivery of services

B) Analyzing programmes, strategies, interventions and policy initiatives from the perspective of their impact on status of women as reflected in important macro indicators like literacy, maternal mortality rate (MMR), participation in work force

a) E.g. analysis of substance and content of various interventions directed at health of women and correlate the same with indicators like MMR to establish need for corrective action in formulation of scheme / approach.

C) Institutionalizing the generation and collection of gender disaggregated data

a) Developing management information system (MIS) for feedback from implementing agencies
b) Inclusion of new parameters in data collection in Census and surveys by National Statistics Organization (NSO), Census Statistics Organization (CSO) etc.

D) Consultations and capacity building

a) Collation of research and exchange of best practices
b) Developing methodologies and tools for dissemination
c) Forums and partnerships amongst experts and stakeholders.

d) Formulation and reflection of satellite accounts to capture the contribution of women to the economy by way of their activities in areas that go unreported like care economy, unpaid work in rearing domestic animals, etc.

In 2004 – 05 the Ministry of Women and Child Development (MWCD) adopted “Budgeting for Gender Equity” as a mission statement. A Strategic Framework of Activities to implement this mission was also framed and disseminated to all Departments of Government of India.

3.5.8 The main importance of the Mission Statement is that:-

a) Gender Budgeting is a process that entails maintaining a gender perspective at various stages - enactment of legislation of policies, planning programmes and schemes, assessment of needs of the target groups, allocation of resources, implementation, impact assessment, out- come assessment, and reprioritization of policy / programme objectives and allocations, thus ensuring that gender is mainstreamed into the development process.

b) Gender Budgeting translates stated gender commitments into budgetary commitments.

c) Thus a gender –sensitive (or gender - responsive) budget is the culmination of the Gender Budgeting process.

To get an idea of how other countries are taking care of GB, I have collected data of Australia and South-Africa where their approaches in short towards GB Framework is given. They also give an idea of how scientific planning of GB can be achieved.

(a) The Australian approach of the “Three way categorization”, distinguishes between-

1) Gender-Specific expenditure.
2) Equal opportunity expenditure for civil servants.
3) General expenditure (the rest) considered in terms of its gender impact.

(b) South-Africa “Five-step Approach” the five steps are following-

1) Analyzing the situation of women & men, girls & boys.
2) Assessing the gender responsiveness of policies.
3) Assessing budget allocations.
4) Monitoring spending & service delivery.
5) Assessing outcomes.

(Source: - Gender Budgeting Handbook for Government of India Ministries and Departments)

3.5.9 Gender Budgeting & India’s International Commitments:-

UN has taken GB as sensitive issue. Many meetings have been conveyed on world level to transfer the potential of GB to all countries and thereby transform lives of women. Government of India has participated in these meetings and have committed to actions to improve status of women at different levels in the country. Following are the international events where Government of India participated & have committed to Women development.

1) The convention on the Elimination of All Forms of Discrimination against Women (CEDAW), which government of India signed in 1980.
4) At the fourth world conference of women in Beijing (1995) government declared their determination “to advance the goals of equality, development & peace for all women everywhere in the interest of all humanity”.
5) In the 1995 commonwealth plan of Action on Gender & Developments declared their vision of a world “In which women & men have equal rights & opportunities in all stages of their lives”.

The above events show various issues dealt in such events with respect to Gender Equality and GB. These are scientific measures based on Data. Government of India has taken initiatives, however, a lot more is to be done through a good public and private partnership.

3.5.10 Indian FIVE YEAR plans & Gender budgeting approach:

Now, India’s planning commission focuses on women’s issues to reduce their problems. That’s why India’s government made a five year plan including women’s development in different areas- Health, Education, Career, Economic, Politics and
Societal etc. In this area women are backward compared to men counterparts. They don’t get proper or equal chance for their whole development.

No doubt that Gender Responsive Budgeting is well recognized as an important tool for enabling gender mainstreaming. The Eleventh Plan had affirmed that “Gender Budgeting and Gender Outcome assessment will be encouraged in all Ministries/Departments at Central and State levels as Gender Budgeting helps assess the gender differential impact of the budget and takes forward the translation of gender commitments to budgetary allocations.”

Before implementation any plan related government & planning commission fixed the some goals & focus on some severe problems & after that allocate the funds / money for achieving the goals.

Following information will give an idea of how the change has taken place in government approach towards gender budgeting through Five year plans.

1) The First Five Year Plan (1951-1956) to promote welfare work through voluntary organization, charitable trust & philanthropic (devoted to music) agencies for set up central social welfare board in 1953.
2) The Second Five Year Plan (1951-1956) supported to development of Mahila Mandals for grassroots work among women.
3) The First & Fourth Five Year Plan (1961-1974) made provisions for women’s education, pre-natal and child health services, supplementary feeding for children, nursing & an expectant mother.
4) The Fifth Five Year Plan (1974-1978) marked a major shift in the approach towards women from welfare to development.
5) The Sixth Five Year Plan (1980-1985) Till sixth plan, there were not specific efforts taken through FIVE YEAR plans that are meant to direct government expenditure in the most planned way. In the Sixth Five Year Plan has accepted women’s development as a separate economic agenda. The multidisciplinary approach with three pronged thrust Health, Education and Employment. Seventh plan onwards there was some focused work started.
6) The Seventh Plan (1987-1992) declared as its objective to bring women into the mainstream of National Development. The Seventh Five Year Plan was introduced in 1987 - 1992. There are 27 beneficiaries – oriented
schemes monitoring by the then Department of Women and Child Development (DWCD). This exercise continues with the increasing number of schemes and developmental programmes in India.

7) **The Eighth Five Year Plan (1992-1997):** Specific focus on gender based resource allocation is seen from the 8th plan onward. It acted as a paradigm shift from development to empowerment. Highlighted for the first time a gender perspective & the need to ensure a definite flow of funds towards the general developmental sectors to women in India. The Finance Minister has established an Expert Group in the year of 2004 for recommendations regarding of Gender Budgeting. The plan document made an express statement that “the benefits to development from different sectors should not by pass women & special programmes on women should be complementary to the general development programmes. The latter, in turn, should reflect greater gender sensitivity.” Rs. 2000 crore was allocated during this plan for women development.

8) **The Ninth Plan (1997-2002)** –The plan has adopted “women component plan” as one of the major strategies & directed both the central & state governments to ensure “not less than 30% of the funds/benefits are earmarked in all the women’s related sectors”. Special audit mechanism was advocated on the flow of the allotted funds/benefits through an effective mechanism to ensure that the proposed strategy brings forth a holistic approach towards empowering women.

9) **The Tenth Plan (2002-2007)** – It has suggested specific strategies policies & programs for empowerment of women. It says “Measurement of development has to go beyond achievement of GDP growth to indicators of distributive justice & their monitoring women headed households have to be specifically targeted, indentifying added disadvantages in the rural & urban locations with reference to different parameters of deprivation. Formulation of Gender Development Indicators to measure Human Development & their use as a tool for monitoring development needs to be hastened”. The Tenth Plan also says,”….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 typing up
these two effective concepts of Women’s 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 and general development sectors”. (Source: - Gender Budgeting Handbook for Government of India Ministries and Departments, Page No. 12)

The United Nation to India has suggested that,” To protect the gains of the past & ensure steady progress on indicators of social development & gender equality & in order to give a fresh impetus to the process of women’s empowerment the 10th plan needs to take some bold policy initiatives.

- Earmarking of funds for women under all major poverty alleviation programs & maintenance of gender disaggregated records of implementation of all poverty alleviation programs.
- Mandatory registration of all assets provided under government programmes (land, House, animals, production units etc.) in the joint name of husband & wife.
- Intensified focus on right education & capacity building interventions for women in all strategic sectors, including health & reproductive health, agriculture, natural resource management, technology, (including information technology) & legal awareness.
- Revision of regulatory framework to allow women’s collectives to access institutional credit, obtain medium-term leases for cultivation on waste lands & common lands, bid for contracts for collection & sale of minor forest produce & other collective activities that will ensure household food security while regenerating the natural resources.

10. The Eleventh Plan (2007 - 2012):- The Approach Paper to the Eleventh Plan states that “gender equity requires adequate provisions to be made in policies and schemes across Ministries and Departments. It also entails strict adherence to Gender budgeting across the board”.

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Sub – Group was set up first time for Eleventh Five Year Plan as a part of the Working Group on Empowerment of Women. This Sub – Group recommended the setting up of a Gender Budgeting bureau in the MWCD, establishment of Regional Resource and Training Centers for Gender Budgeting (RRTCGB) as well as preparation of Gender Budgeting training manuals. The report of the sub – group was incorporated as a part of the Working Group on Women and submitted to the Planning Commission.

3.6 Gender Audit (GA):-

3.6.1. How GA came into existence:

In 1983 the Australian parliament made a precedent setting decision. At the initiative of “Femocrats” from the labour party, the political party then in power a resolution was passed to look into how the national budget of Australia was likely to affect the status of women in a country. A year later that resolution was implemented when the national budget was presented in Australian parliament. The statement was an extensive / large report detailing the implications of the proposed budget for Australian women & girls.

Since that time, reports, analyzing the effect of national budget on the status of women have been published in some 40 countries around the world (Taken as it is through ref - Sharp & Broomhill 2002).

This development resulted into GA and it started gaining momentum.

About “Gender Budget Statement” or “Gender Audit”:-

A gender audit is essentially a “Social Audit” & belongs to the category of “quality audits”, which distinguishes it from traditional “financial audits”. It considers whether internal practices & related support systems for gender mainstreaming are effective & reinforce each other & whether they are being followed. It establishes a baseline; identifies critical gaps & challenges & recommends ways of addressing them, suggesting possible improvements & innovations. It also documents good practices towards the achievement of gender audit.
3.6.2. Some more features of Gender Audit:

1. It takes place after budget is adopted and implemented.
2. It analyzes the income & expenditure of the government from a gender point of view.
3. The Gender Audit assumes that any ‘Public Policy’ impacts differently on men & women. This is due to different roles of women & men in the family & in economic activities.
4. The purpose of gender audits is to lead to changes in public policy that contribute to an increase in gender equality.
5. GA program is designed to reduce imbalance in employment in men and women. High degree of unemployment in women in comparison with men is a matter of concern and needs to be considered in GA, aiming to reduce women unemployment.
6. GA of the national budget also points out to the areas in which efforts need to be taken & allocations need to be made to promote the status of women in general & the status of women from disadvantaged groups in particular as well.
7. A past advisor to the prime minister of Australia described one of the goals of gender audits as “to build into each development a clear awareness that everything they do, every dollar they spend has an impact on women & that impact is very often different for women than for men”(Sharp & Broomhill 1998:6)
8. As any audit of budget does, a GA of the budget examines both income (taxation) & expenditure (budget) concerning taxation, a gender audit asks how the tax burden is divided between high & low income persons & between men & women.
9. GA also audits spending on various social security schemes and examines the conditions of entitlement on number of men and women benefiting from these schemes / programs.
10. On global level, GA of the national budget is presently being performed in about 40 countries. Here is some more data on it.
• For the first time the gender audit was done in Australia in 1984 by the government itself.
• In Canada was done gender audit since 1995.
• In South Africa the first gender audit was done in 1996.

As a result of efforts taken under GA, it enhances the collective capacity of the organization to examine its activities from a gender perspective & identify strengths & weakness in promoting gender equality issues. It monitors & assesses the relative progress made in gender mainstreaming & helps to build organizational ownership for gender equality initiatives.

3.6.3. Focus of Gender Audit:
1) Depiction of quantum & trend of resources allocated for women in government budget at the national, state & lower levels of administration commenting on adequacy or inadequacy of the allocation & reality check on translation of budgetary provision into actual expenditure.
2) Analysis of impact of the expenditure & review of effectiveness of public programmes targeted for welfare & development from the point of view of design & implementation & comments on status of access of women to select public services.
3) Adoption of a few macro indices like MMR work participation, literacy etc. That dominates the measurement of gender status highlighting gender differentials to focus attention on need for enhanced allocation for women in certain sectors like health education & employment.

3.7. Gender Mainstreaming (GM):-

It is important that gender equality be dealt sincerely at all levels. It is important that women be brought in mainstream in all economic development related areas. GM deals with this mainstreaming, that is, how women and men are equally taken care of in the process of development so that the development is not lopsided, that is, only men are taken in mainstream and women are left aside.

The topic will be clear from the following statement:

“Mainstreaming a gender perspective is the process of accessing the implications for women & men of any planned action, including legislation, policies, or programmes, in any areas & at all levels. It is strategy for making the concern &
experiences of women as well as of men an integral part of the design, implementation, monitoring & evaluation of policies & programmes in all political, economic & social spheres. So that women & men benefit equally & inequality is not perpetuated. The ultimate goal of mainstreaming is to achieve gender equality”.

Gender Mainstreaming is a continuous, dynamic process of integrating a gender perspective into each stage of the development process, with a view to enabling equality and equity between men and women. Gender Mainstreaming is about considering gender in all policies, planning, and budgets and monitoring instead of addressing gender as separate issue through separate program. It is not an end in itself but is a process or a means to enabling equity. Mainstreaming gender into the development planning process essentially means viewing each activity that uses public resources through a gender lens to ensure that it reduces (and does not exacerbate) existing gender disparities.

3.7.1. Basic principles of mainstreaming:

According to Carolyn Hannan, (Director of the United Nations Division for the Advancement of women), responsibility for implementing the mainstreaming strategy is system-wide & rests at the highest levels within agencies.

Other principles are:

1) Adequate accountability mechanisms for monitoring progress need to be established.
2) The initial identification of issues & problems across all area(s) of activity should be such that gender differences & disparities can be diagnosed.
3) Assumptions that issues or problems are natural from a gender-equality perspective should never be made.
4) Gender analysis should always be carried out.
5) Clear political will & allocation of adequate resources for mainstreaming including additional financial & human resources if necessary are important for translation of the concept into practice.
6) Gender mainstreaming requires that efforts be made to burden. Women’s equitable participate at all levels of decision making.
7) Mainstreaming does not replace the need for targeted, women–specific policies & programmes, positive legislation not dose it do away with the need for gender units or focal points.

3.7.2. Here are some points of GM:

1. In July 1997, the United Nations Economic & Social Council (ECOSOC) defined the concept of gender mainstreaming as follow-
   “Gender mainstreaming is a globally accepted strategy for promoting gender equality. Mainstreaming is not an end in itself but a strategy an approach a means to achieve the goal of gender equality. Mainstreaming involves making sure that gender perspectives & attention to the goal of gender equality are central to all activities-policy development, research, advocacy dialogue, legislation, resource allocation & planning implementation & monitoring of programmes & projects”.

2. GM was first proposed in 1985 at the Third World conference on Women in Nairobi - (Capital of Kenya).

3. It was adopted as a global strategy for promoting gender equality as a platform for action adopted at the United Nations fourth world conference on women held in Beijing (China) in 1995. It highlighted the necessity to ensure that gender equality is a primary goal in all areas of social & economic development.

4. This meet in China was the largest ever meet / conference of women held by UN. It adopted ‘Women’s rights are human rights’ in the declaration as the end result. It was also agreed to have separate UN bodies to women that have played a catalyst role in developing standards. This is also called ‘Gender Mainstreaming’.

5. GM empowers women by removing hurdles that have existed in the society and ceases to pass on benefits to women. This is done by evaluating laws policies, programs, customs, practices & an array of inequities from a gender perspective women & men can identify those areas in which women have been discriminated against & develop new policies to overcome that discrimination.

6. In August 1995, the United States delegation to Beijing circulated a paper entitled, “Gender”. It gave importance to the need to mainstream gender concerns. It said, “At the base of the use of the ward gender……is the
concept that biology need not determine everything that men & women do. That opens the door to change, to changing the balance of power & responsibility between men & women – in the home, in the work place, the market place….That is what the UN charter of 1945 is about when it calls for equal rights of men & women. There is simply no way to say that & not mean change”.

7. Mainstreaming also wants increasing women’s actual participation in the human rights mechanisms so that GM has an enduring effect on the way human rights work is carried out. It aims at resolving bureaucratic problems of co-ordination & co-operation among UN systems.

8. GM includes gender specific activities. It takes care of both, men and women who are in disadvantaged position. It can be exclusively for target women exclusively for men & women together or only for men. This ensures benefits equally from developmental efforts. These are necessary temporary measures designed to combat the direct & indirect consequences past discrimination.

In short, GM is the public policy concept. It assesses various implications for women and men against any planned policy action that includes legislations and developmental programs, in all areas. It is a pluralistic approach valuing diversity in men and women.

It is observed that GM is fairly easy to implement in organizational environments that support multi disciplinary focus, teamwork, creative thinking, flexibility and risk taking.

The goal of mainstreaming gender equality is thus the transformation of unequal society & institutional structures into equal & just structures for both men & women.

The greatest struggle has been simply to make the human rights of women visible, whether it is with regard to the use of violence against women or in issues of employment, education, health care or other rights.

As the UN’s human rights staff explained in December 1999. “Gender Mainstreaming is thus the process of bringing an awareness of the status of women into the public arena. In the field of human rights, this primarily involves realizing that there is gender dimension to every occurrence of a human rights violation”.

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Selected Readings:-

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2) “Dr. Vibhuti Patel”, “Gender Budgeting”
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5) BRIDGE development – Gender, Report No. 40, October 1997, “Gender and empowerment: definitions, approaches and implications for policy” , Briefing prepared for the Swedish International Development Cooperation Agency (Sida)
6) Himachal Pradesh Development Report , Chapter no. 10 “Gender Empowerment”(Page No. 193)
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