

**ENGENDERING LOCAL DEVELOPMENT PLANS:
GENDER BUDGETING INITIATIVE
BY A LOCAL GOVERNMENT INSTITUTION IN KERALA, INDIA**

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Governments at different levels in various countries have adopted Gender Budgeting as a tool for equitable resource allocation reflecting the realization that gender equality is essential for sustainable economic growth and social development. This newly emerged perspective of integrating gender into government budgets questions the general notion of taking government budgets as neutral instruments of revenue allocation. Through the gender responsive budgeting process governments try to address the problem of differential impacts of financial allocations on men and women (see Rubin and Bartle, 2005). Different definitions are using for gender budgets and all of them agree upon this common perspective:

It is important to recognize that ‘women’s budgets’ or ‘gender-sensitive budgets’ are not separate budgets for women, or for men. They are attempts to break down, or disaggregate, the government’s mainstream budget according to its impact on women and men, and different groups of women and men, with cognizance being given to the society’s underpinning gender relation. (Sharp, cited in Budlender et al., 1998: 5)

Making budgets more gender responsive is generally an exercise initiated at the national level. Gender Budget initiatives undertaken by Australia and South Africa are considered the pioneering efforts in this field. They were attempted at national levels but each has adopted different methodologies. These initiatives brought international attention to this exercise and developed effective gender mainstreaming frameworks in planning and budgeting. Gender budgeting initiatives at local contexts are not very common because of the challenges involved in addressing the complexities of socio-cultural factors which constitute gender disparity of that specific spatial and temporal context. This case study is about an attempt of a gender budgeting initiative undertaken by a Local Self Government Institution; the grass root level governance unit in the state of Kerala in India. It is based on field level interactions as well as the personal experience of the author being the part of the action research team that contributed academic support to the initiative.

Evolution and process of decentralisation in Kerala

The 73rd and 74th Amendments to the Indian Constitution put forward the objective of democratic decentralization by introducing the three-tier system of Local Government Institutions, the *panchayats*, with greater powers. It prescribed the uniform three-tier system of

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local governments; district, block and village level in the rural areas and town *panchayats* in smaller urban centers, municipalities and corporations in larger urban centers. These Local Self Government Institutions (LSGIs) have a uniform five year term, representation for scheduled caste/tribes proportionate to their population and one-third reservation for women at all levels, ensuring increased participation of marginalized people and women.

On the basis of the constitutional amendment, the Kerala Panchayati Raj act was passed by the Kerala State Assembly in 1994. The Left Democratic Front government in power extended it further and introduced the process of planning and development giving space to greater participation of people on the basis of the recommendations of a committee on decentralization of powers chaired by Dr. S.B. Sen in March 1999. This amendment allows more administrative power, responsibility and funds to LSGIs. Gender concerns were mainstreamed through a “women in development approach”¹- integrating women into existing development process, by targeting them- to the decentralisation process in Kerala (Mukherjee and Seema, 2000).

Through mobilization of women in self-help group networks, participation in local planning processes and presence of elected women representatives in various tiers of local governance contributed to an increased presence of women in the public sphere. The higher standards of social development indicators which are favourable to women created a better living condition for them. But at the same time our society is highly patriarchal in controlling women’s social participation and mobility. Women’s access and control over financial resources are limited and vary between caste and religious groups. This paradoxical coexistence of favourable development indicators with negative trends of women’s autonomy is at the centre of debates in feminist discussion forums in recent years. The decentralisation process integrated these discussions on women’s status as part of its central concerns.

The experience of Kerala in local governance has some special features. If we go through the recent political history of Kerala, we can see many conducive factors, which helped to set up this background. Starting from the social reform movements that began in the last decades of 19th century, Kerala made a long run in this process of social mobilization and social development. The National Independence movement, progressive political movements, expansive opportunities in education, the growth of trade and commerce, new agricultural practices such as introduction of cash crops, new industries, new trends in literature, the widespread influence of the printing and publishing industry and the wider reach of newspapers all played an important role in “making the modern Kerala”. This unique Kerala experience, otherwise known as the ‘Kerala Model’ is being acclaimed for its achievements in ensuring that basic needs can be met even at a low level of economic development. According to the 2011 Census of India, Kerala came out with the highest female literacy rate of 91.98% in the country (65.46 is the Indian average) and male literacy rate of 96.02% (Indian average is 82.14). The Infant mortality rate in Kerala is 13% as against 80 in India (2001 Census). The health indicators of the state reflect a higher quality of life.² The number of children per couple has declined to less than two. The sex ratio of the state is favourable to women. A wide network of schools and village libraries function throughout the state.

¹ UNESCO’s Gender mainstreaming Implementation Framework.

² Kerala’s achievement in poverty alleviation and how it positively influenced the gender dimensions of poverty has been discussed in detail by Kannan (1999).

Participation of women

The Beijing Platform for Action critically evaluated that participation in structures and institutions is crucial in empowering women as active political participants of democracy. One major difference in the LSGI context is that it offers more inclusive space of activity for women than just political representation in a formal sense. Political engagement as participation in various activities related to democracy is an important aspect of claiming citizenship. The feminist notion of citizenship looks beyond the dichotomy of public-private divide and recognizes political participation as an expanding field of activity.

The decentralisation process in Kerala has created opportunities for women in four dimensions: organizational, governance, local economy and societal. At the organizational level different women's structures such as Kudumbashree neighborhood groups³ have been working effectively and have now outgrown their mobilization models to a more matured capacity to raise women's voices in asserting their concerns. In the governance structures women are entitled to 50% of total elected seats and membership in various committees is ensured. A Women's Component Plan (WCP) was introduced as an integral part of the Annual Plans of LSGIs at different levels that earmarked 10% of the total plan grant for projects directly benefiting women. Women have a crucial role in the implementation of many programmes like MNREGS⁴, PTAs⁵, welfare committees of *anganwadis* (child care centres)⁶ etc. Now, many of the LSGIs are implementing schemes for enhancing opportunities for women in the local economy, like leased land cultivation, micro enterprises in food processing, garment making units etc. New sustainable models are emerging despite many failures. All these interventions definitely have an influence over women's changing role in various community organizations and it has started to be reflected in societal attitudes. But here the changing process is slow and it is always mediated with stronger cultural and economical forces in the society.

In the local development context, the notion of the public can be visualized as a democratically-negotiated and, therefore, an inclusive collective space for the specific local development agenda. The decentralisation process provides an enabling environment for women's participation in local planning and gender responsive planning and governance initiatives have evolved gradually.

³ Kudumbashree (meaning prosperity of family) is the state level poverty reduction programme implemented by the state government. It is a network of women self help groups organized at the grass root level that build around the components, micro credit, entrepreneurship and empowerment of women. See also the article from Ananya Mukherjee in the section "Viewpoint" in this issue.

⁴ MNREGA –Mahatma Gandhi Rural Employment Guarantee Scheme – a social employment scheme for men and women implemented by Govt. of India.

⁵ PTA – Parent Teacher Associations in schools are active in schools as a supportive network.

⁶ Anganvadi- Child care centres functioning under the government scheme of Integrated Child Care Services for day care & nutritional support for children of 3-6 age group. The health and nutritional need of a child cannot be addressed in isolation from those of the mother in the early years. The programme also extends to pregnant women, nursing mother and adolescent girls.

Mainstreaming gender into the planning circle

The planning process in LSGIs in Kerala has four phases: (1) participatory policy framing - in community level discussion meetings called *Grama sabhas*; (2) designing a policy strategy - through development seminars and preparation of a development report; (3) From policy to planning - by setting up working groups for various fields, such as education, health, agriculture, local economic growth, women's development etc; (4) plan formulation by LSGIs - through preparation of plan documents and the annual budget. The local development plan and annual budget are formulated through these steps and 10% of the total budget is earmarked for the Women Component Plan (WCP). Development projects that directly address the practical and strategic needs of women and exclusively targeting women are included in WCP. Apart from this, there is a government directive that all the general projects should be gender sensitive and should not affect the situation of women negatively.

Even though these enabling structural modalities are available, the development plans at LSGIs have not become gender responsive in terms of addressing the locally-specific gender disparities. Physical allocation of funds to WCP has been done successfully for many years but it is not reflected positively in influencing changes in gender roles or women's situation in general. There are a number of success stories but the planners and women activists are looking for more effective models. The gender budgeting initiative started by the Kerala Institute for Local Administration (KILA) in collaboration with a few selected Local Government Institutions is such an effort, aimed at engendering the local development plans. Mararikkulam Grama Panchayat is one among those LSGIs that took up the gender budgeting initiative and successfully completed the first phase of it.

Mararikkulam experience

Mararikkulam (West) is a village *panchayat*⁷ located along the coast of the Arabian Sea. It is part of Alappuzha District of central Kerala, having a total population of 62,000 of which 32,292 are women and 30,708 men. This village has a high population density with a total area of 19.07 square kilometers. The elected council has 23 members representing all 23 wards and among them 13 are elected women representatives, more than the official 50% quota. People living here are generally poor. Small scale agriculture, fisheries, animal husbandry and making coir⁸ are their major occupations and a small section of people are government employees. The village generally has a higher educational level with 7 upper primary schools, 2 high schools, 51 *anganwadis* (child care centers) and 13 pre-school learning centers. One primary health center and agriculture office is working here to support the GPs activities in planning and implementation of development projects.

⁷ Village councils known as Grama Panchayats (GP) in the Indian context are the grassroot level governance units in the three-tier local governance structure. Every GP has a fixed governance area delimited by clear boundaries and divided into various wards. It has an elected council of representatives directly elected from the wards. 50% of elected seats are reserved for women.

⁸ A cottage industry in Kerala for making ropes out of locally processed coconut husk. A large number of women are working in household units.

President of the GP, Mr. Snehajan shares the effort and concern behind the initiative of gender budgeting:

We are facing a stagnant economy and social dismay through years mainly because of the decline in agriculture, fisheries and our cottage industry of coir. No major new occupations are emerging and the economically poor people are struggling. Women, though having basic education, have little opportunities for social participation and work outside their homes. The panchayat council made an effort to revive the local economic and social scene through innovative development projects by integrating the local labour power and available natural resources. For that we adopt a gender sensitive approach to ensure women's participation, and for that ensure them a safe and gender friendly environment. We wish to make our place a women friendly village.

Activities to prepare a gender budget through engendering the development plan of the GP were started as a joint action research programme by KILA and the Mararikkulam GP during the planning year of 2010-11. The process started as a concerted effort to identify developmental needs and to formulate new projects to address them from a gender perspective. The existing general planning cycle of the GP was followed but it was improvised further by some pre-preparations for situational analysis as well as designing innovative solutions. Major pre-planning activities were a quick gender status study of the area, gender analysis of local institutions - those giving various services to the public - and a review of last year's plan and budget.

Stepping towards an engendered development plan

The first phase of the action research was forming a task force of local level resource persons to take the leadership of the initiative. This group includes working group members from various development sectors, elected representatives and experts available and willing to do voluntary work. The entire work of identifying the gender needs, and preparation and prioritization of development projects for the annual plan was done by this resource group. Retired persons as experts, women leaders of SHGs, implementing officials of various development sectors and elected representatives were part of this group. Orientation trainings were organized to familiarize the group on general concepts about gender perspective of plan analysis. A detailed review of the last year's development plan and budget was also done by the resource group. This review aimed to analyse the effectiveness of projects implemented and their relevance in terms of solving the issues existing in the sector. The review brought out that most of the development projects were not directly addressing the needs of the sector and the budget did not indicate any specific gender approach.

The second phase had these major activities:

- doing a gender status study & gender analysis of institutions
- prioritization and categorization of gender issues identified through the gender status study and institutional analysis and preparing an intervention plan
- exploring ways of addressing the issues with existing possibilities
- conducting multi-stakeholder workshop at GP level
- preparation of an engendered plan

- discussion of the plan in the *grama sabha* and development seminar
- plan finalization and budget session
- implementation of the engendered plan

Discovering the status of women - a learning process of gender relations

The second phase of the programme was more process-oriented and field-intensive. The major tasks at this stage were to conduct a gender status study and institutional analysis with a gender perspective. The methodology of the gender status study has two steps: (1) collection of secondary data about women's literacy, health, employment, property and ownership over land, assets, crime rate, educational status and women's social participation (2) Focus Group Discussions (FGDs) with special groups of women. Here, the role of Kudumbashree - network of women SHGs- was very crucial. Mararikkulam GP has an active network of nearly 200 women SHGs federated at the GP level in a body called Kudumbashree CDS (Community Development Society) with elected representatives from the SHGs, a few officials and representatives of the *panchayat's* governing council. It has ward-level committees constituted with a similar pattern. The entire process of gender status study was discussed with the representatives of Kudumbashree network and the focus group discussions were organized with them.



Kudumbashree neighbourhood meeting

Census data, school enrolment records, admission registers of the primary health centre, records of ICDS, title deed records in village land registration offices, various registers in the village *panchayat* office and local police station records provided important secondary data on the status of women. Specially developed formats were used for compiling the data collected from the Gender Status Study and Gender Analysis of Service Institutions.

Members of the resource team reviewed their experiences as a real eye-opener into the social situation of their village. For the women in the team it was like hearing many stories they had been hearing, engaging with or experiencing every day. And for the men, they were involved in a process of analyzing the social situation from a woman's angle. Major problems highlighted were a high rate of unemployment among women, lack of access and control over financial matters and property rights, increasing crimes against women and hence the fear of violence, loss of jobs and wages in traditional cottage industries and agriculture and lack of sanitation facilities such as toilets for women in public places and lack of such facilities for female vendors working in markets. Traditionally, the main employment sectors for women in this area were agriculture and household units of coir manufacturing. These two sectors are in decline and the newly-introduced less-labour intensive agriculture practices discourage women workers. Earlier, women were doing the fish vending through door-to-door sales and in village markets. Now, fisheries are no longer a community activity and have become more mechanized. Trading is mainly done through commercial units or through individuals having more money to invest, so women are slowly disappearing from this field. The paradoxical situation of increasing potential and willingness in women's labour force and decreasing opportunities of available employment even with a rising standard of life is a Kerala-specific situation (Kumar, 1994). Mararikkulam GP also shares this situation.

The gender status study brought out a general picture of women's situation in the area. But the training given to the taskforce about the conceptual framework for understanding the situation of women was insufficient. As a result, the status report was more focused on suggestions for new development projects rather than analyzing women's locally-specific problems. As a general picture the study illustrated the broad general pattern of women's situation in Kerala.

Gender analysis of institutions

General infrastructure available and the efficiency of services provided by the institutions that provide services to the public, like the village *panchayat* office, primary health centre, agriculture office, schools, day care centres of ICDS, veterinary hospital, etc. were examined. Availability of facilities and services of these institutions for women stakeholders, both employees and the public, was the main criteria of this examination. Institutional analysis was done mainly to catch up with the existing infrastructure shortages and procedural gaps in providing services. The gaps identified were thus the development needs to be addressed in terms of infrastructure development as well as quality of service. These turned out to be the indicators used to prepare special development projects to solve these shortcomings.

identified and suggestions prioritized. Taskforce members sat together and prepared the development strategy based on the priorities identified.

Table 1

| Sector | Major developmental issues | Gender specific issues identified from the sector | Projects/ project ideas suggested |
|-----------------------------------|---|--|--|
| Agriculture & Fisheries | <p>Fertile agriculture lands lay unused</p> <p>In fisheries earlier community activity networks were broken.</p> <p>Mechanization needs more capital investment.</p> <p>Trading became capital intensified.</p> | <p>Number of women having ownership over land is very few. Women are not identified as farmers/cultivators</p> <p>Women fish venders are in decrease. They can't compete with the capital intensive marketing. Lack of facilities in markets</p> | <p>Awareness programme for joint ownership of land by women and men. More cultivation-oriented projects to distribute seeds and fertilizers.</p> <p>Loan schemes for women fish venders. New projects for ornamental fish rearing, fish processing units, skill building & management trainings.</p> |
| Animal Husbandry & dairy products | <p>Shortage of fodder, low price, lack of subsidy for cattle feeds, inadequate local market network</p> | <p>This sector is not very profitable and men are not interested to work. So women have taken the extra burden of cattle rearing & dairy. Women are not part of the milk produce co-operatives.</p> | <p>Group dairy projects for women, make women members of milk co-operatives, projects for introducing technological support to lessen the burden of labour, subsidy for fodder cultivation</p> |

Major problems identified related to women and development were lack of skills and technological expertise of women engaged in various occupations, lack of public toilet facilities, lack of access and control over resources like land, bank deposits, financial assets, loss of employment either due to decline or commercialisation of agriculture, fisheries and traditional industries. Women were also facing lack of effective management skills to run microenterprises. A greater concern expressed by the gender status study and discussions shared by women in general was a fear over increasing violence against women and lack of self esteem. This is viewed as the major constraint for development and importance of projects to address this constraint was mooted strongly. This was adopted as one important concern of the development plan.

The first step is engendering the local

A multi stakeholder consultation was organized at village level as a one day workshop in which the Gender Status Study, findings of sector-wide analyses, identified developmental issues and suggested projects were discussed. Group discussions were conducted among various sector-wide groups. New projects were prepared by the task force after the workshop and the development plan highlighting gender concerns was the final document produced. The taskforce and the *panchayat* governing committee reached a consensus through this process that the next year's annual development plan would create more opportunities for women in terms of

employment by introducing new projects and special projects for enhancing women's confidence and self esteem to combat the environment of fear over gendered violence.

Women's safety as a goal of development

One of the major concerns of the plan is ensuring mental and psychological development of children with a special focus on girls and training for self-defence. This is envisaged as a major project which covers 7262 children from *anganwadis* (day care centres of ICDS) to higher secondary level. Main components of the project are aerobics training to all children, student councillors in schools, safety boxes in schools for students to write and share their fears and thoughts freely, taekwondo (a self-defence programme) trainings for all school-going girls, vigil groups to handle issues of harassment against women and counselling training for parents. The entire programme will be operated through a group of resource persons, male volunteers and with the leadership of women from Kudumbashree neighbourhood group network. Kudumbashree will set up a counselling centre for parents as part of this project. This is aimed to make a women-friendly village through ensuring safety and free movement of women.



Adolescent girls group meeting

The remaining three steps of the plan process are related to implementation of the ongoing plan. Women in the self-help group networks can act as a support system to take this initiative forward and build it as a process of determining the local planning agenda. A favourable situation exists in the present local planning process for gender concerns to intervene and influence the local gender setting. A strong political intervention of gender politics is important at this moment; otherwise the official bureaucratic 'add on' of women's projects will take over. While talking to the women in neighbourhood groups they shared their enthusiasm and the importance of their participation in the process. For the first time they felt that the concerns for their personal safety

and mobility took central consideration in a discussion on local development. But at the same time they are still either not aware or not equipped to make a detailed assessment of the situation. Ms. Shylaja Venu, a key resource person participating the entire process and coordinating main activities shared her thoughts:

We have now travelled a great distance to realise the situation of women in general. But we still need more analytical tools to identify the root causes. We need a collective force to strategise new methods to solve our problems. We still have to depend upon men for knowledge, information and money, and are forced to make unwanted compromises to make out a little more breathing space of freedom. This exercise makes me confident to intervene and go forward.

A new experiment and a lesson

This is a modest attempt of engendering the local development plan by applying certain gender budgeting principles. The enabling situations existing in the Kerala context offers a chance to attempt this experiment. The projects developed through this process are at different stages of implementation. From 2011 August the projects start functioning. Many of the problems, including the most urgent one of unemployment among women, still remain unresolved. There are issues of lower participation rates of women in the process. The engendering of the plan is also not complete or integrated at different levels and across sectors. The LSGI committee decided to continue the process for the next year, improvised further with the lessons learned from the first year. But the major success of this experiment lies in two factors: analysis of development problems and reformulation of plan priorities with a gender-specific approach. This exercise puts economic freedom, women's safety, mobility and their right to protect themselves as the central concerns of planning for development. This is a major shift in the developmental approach in local planning and the success of this experiment lies in this shift despite its problems of design.

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