
En la Economía Contamos Todas y Todos

CUADERNO DE TRABAJO 12

Categories for the Analysis and Orientation of Public Investment in Terms of Gender Equality in Bolivia





CONTENTS





INTRODUCTION

Several years ago the feminist analysis undertook the challenge of anchoring theoretical discussions on policies in a concrete way and developed proposals to relate macroeconomics, gender and public policies. An effort that set the beginning and progression of this journey in the 80's was the initiative of analyzing public budgets by developing several experiences and tools with the aim of identifying, in the first place, the repercussions of fiscal policies enforced through the budgets aimed at reducing the existing inequalities between men and women; and, at the same time, the requirement to place life care and sustainability at the center of the vision of the countries and the planning of public policies and budgets.


Diane Elson, Rondha Sharp, Debbi Budlender, pioneers in the study of gender responsive budgets, underlined the fact that public budgets lack a comprehensive vision of the interests and the situation of women and men in society and that they are not neutral in terms of gender since the policies on income and expenditure have different impacts on women and men of different population groups. In this context, progress was made to develop methodologies and tools for the analysis of public budgets and to prepare gender-responsive public budgets.

Initially, different tools and methodologies were developed for the **analysis of public budget** from the gender perspective.¹

Tools and proposals were developed later on in order to **intervene in the different phases of the budgetary cycle** and, thus, transform the way in which budgets were prepared and implemented. In the **formulation phase** instruments and methodologies have been developed to introduce the gender approach in the budget planning and programming processes as a tool to orient public investment towards gender equality. These instruments and methodologies include the creation of training, technical assistance and research processes as well as actions for incidence and follow up. The aim of these proposals is to advance in the elaboration of cognitive and management skills that enable the establishment of links between knowledge about budgetary procedures and laws with the awareness and – above all – the attention to gender differences and unpaid work.

The **categories for the analysis and orientation of public investment in gender equality** were proposed by several Bolivian women's institutions and organizations articulated in the Bolivian National Working Group on Gender-Responsive Budgets (MNT _ GRB)

1 Tools proposed by Diane Elson, Ronda Sharp **1. Assessment of gender-aware public policies. 2. Gender-disaggregated beneficiary assessment. 3. Gender-disaggregated public expenditure incidence analysis. 4. Gender-disaggregated income incidence analysis. 5. Gender-disaggregated analysis of the budget impact on time use. 6. Report on the gender-awareness budget. 7. Gender-aware medium-term economic policy framework. 8. Gender-equality indicators on investment** (tool developed in Bolivia upon the gender investment categories.) **Ronda Sharp's methodology of classification of expenditure in three categories:** Gender-specific expenditure targeting women and girls and men and boys; Expenditure promoting equal employment opportunities in the public sector; and General expenditure.



which, between 2001 y 2012², undertook the challenge of preparing a theoretical-methodological tool to analyze the annual operational plans (AOPs) and budgets and channel public investment at all levels of the State. They were built upon the work of women's organizations with men and women officials of the different municipalities, local governments or in national entities, through activities of national incidence aimed at incorporating gender equality in laws and regulations, particularly those related to fiscal policy and public budgets³.

The document proposed herein gathers the findings, contributions and learning achieved in the process of constructing these categories. It was elaborated as a theoretical-operative reference proposal for the analysis and orientation of public policies and budgets from a comprehensive approach of life care and sustainability, the construction of gender equality and the advancement in the compliance of women's rights.

In Latin America the categories to analyze and channel public investment in gender equality have become a reference for countries working with GRB. In addition to the Bolivian experience, they have been used in experiences in Ecuador, Honduras, and Argentina.

This document is therefore published in order to share – in the most

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- 2 These categories, developed jointly since 2005, were agreed in a first instance by all the parties, GRB specialists, and some members of the GRB National Working Group (MNT-GRB) in Bolivia, are contained in the "Guide to Collect and Systematize Gender Information in Municipal and Prefect Budgets", in the "Gender Mainstreaming Guide in the Sectorial Development Plans (SDP)" published by the Vice Ministry on Equal Opportunities of the Ministry of Justice at the end of 2009. A second consensus on the categories took place in February 2012 and is included in the "Report on the Outcome of the National Workshop on Categories" held with counterparties of UN Women's GRB Program in Bolivia, the results of this work are also included in this systematization.
 - 3 Carmen Zabalaga E.: *Sistematization of the experience: "Categories for the analysis and orientation of public investment in gender equality"*. UN Women 2012.

comprehensive and systematic way – the knowledge resulting from years of work in Bolivia, with institutions, organizations and people from different countries for them to take it as a reference, use it, and adapt it to their own experiences and contexts.

The document is divided into two parts. The first part relates the topic of Gender-Responsive Budgets with gender-equality investment categories. The second part accounts for the theoretical support, the definition and the contents of the categories for the analysis and orientation of public expenditure at different levels of the State.

The development of this instrument was entrusted to Carmen Zabalaga, with the collaboration of Silvia Fernández, Tania Sánchez, Raquel Coello, Mirela Armand Ugon, and Leonor Patscheider. Different spaces for reflection and debate were generated with them and with other peers from the *Femenine Institute of Integral Training* (IFFI), *Colectivo Cabildeo* and the National Working Group in GRB. All this contribution and the work that they developed in Bolivia has made it possible for us to have a document which we hope can contribute to the work of women and the feminist movement in the task of promoting fair and equitable policies and budgets: Gender-Responsive Budgets.

Åsa Regner

1. GENDER-RESPONSIVE BUDGETS AND GENDER-QUALITY INVESTMENT ANALYSIS AND ORIENTATION IN THE BOLIVIAN EXPERIENCE

1.1 Conceptualization and Progress Made in Gender-Responsive Budgets

Gender-Responsive Budgets (GRB) aim, in general, to examine and demand public budgets to be allocated in such a way that they promote gender equality. They are based on the acknowledgement of the fact that fiscal policies and public budgets are not gender-neutral, and that they express an orientation that echoes political economy and the vision of development and therefore produce differentiated impacts on men and women. For the proposed budgetary allocation redistribution, GRBs are based on the recognition and identification of the different needs, interests and the inequalities between women and men in society, which come from the underlying gender inequalities. *In order to issue specific policies that not only guarantee equality in the distribution of wealth between women and men, but that can also contribute to overcome the gaps and gender discrimination that exist in our country, actions, services, and resources must be channeled to issues that determine such gaps and they must reach the different groups and social sectors, taking their specificities into consideration.*⁴ A gender-responsive budget not only guarantees an equitable distribution of the resources but also an efficient use of these resources.

GRBs are therefore related to processes, tools and proposals that aim to channel the redistribution of public resources and the design of policies, programs and actions taking into consideration the causes of discrimination and the repercussions of budgets on the generation of differentiated impacts on men and women.

4 *Analysis of Municipal Budgets 2007, IV Report from the Gender Equality Observatory, IFFI, 2009.*

Throughout their implementation, the work with GRBs has taken on specific and strategic characteristics in accordance with the proposed goals, the implemented initiatives, the tools used, the political and social context and the institutional and administrative willingness of each country or community. Nevertheless, we can establish the following core goals⁵:

- To sensitize stakeholders on gender issues and the impact of budgets and policies on them;
- To make governments accountable for translating the compromises acquired on gender equality and budgetary commitments.
- To modify the budgets and policies in order to promote gender equality.

In general, GRB initiatives have certain characteristics in common⁶, e.g.:

- They do not seek to formulate separate budgets for men and for women but are focused on gender analysis and mainstreaming in all budgetary areas and phases as well as in public policies that enable them;
- They promote an active participation of women's organizations and civil society;

5 Reference taken from Rhonda Sharp "Budgeting for Equity: Gender Budget Initiatives Within a Framework of Performance Oriented Budgeting." United Nations Development Fund for Women (UNIFEM) New York, 2003. P. 19.

6 Source: "Gender-Responsive budget Initiatives", UNIFEM Latin America and the Caribbean; "Budgets oriented to equality between men and women", UNIFEM, PNUD, UNFPA, GTZ, "Gender-Responsive budget Initiatives", UNIFEM Latin America and the Caribbean; "Budgets oriented to equality between men and women", UNIFEM, PNUD, UNFPA, GTZ, Pro-Gender Equity Fiscal Policy in Latin America and the Caribbean.

- They promote the prioritizing of resources and their most effective use according to the situation of the women and men to whom they are addressed to promote gender equality, the eradication of poverty and human development;
- They follow up and evaluate both the fundraising and allocation of resources by governments with a gender perspective.

In the mid-80's⁷, upon a governmental initiative, the first experience on gender-responsive budgets took place in Australia, as a strategy to mainstream the gender approach in economic and social policies. While this first initiative was more focused on "women's budgets" aimed at the impacts on girls and women, during the 90's, the term 'gender-responsive budget' was adopted and the idea of budgets addressed only to women was eliminated.

In 1995, the idea of gender budgets was recommended by the Beijing Platform for Action, which urged governments to take measures to systematically revise the way in which women benefit from public expenditure and to adjust the budgets in order to assure equal access to public expenditure. With this actions, government accountability regarding gender equality and mainstreaming was promoted. As of 1996, GRB initiatives, methodologies and tools multiplied in the different countries, supported by this international commitment to gender equality and with the collaboration of different international cooperation agencies.

In 2000, UNIFEM (currently United Nations Entity for Gender Equality and the Empowerment of Women – UN Women), started working on the topic of gender-responsive budgets in the world by supporting

7 Op. Cit. p. 21.


different Latin American experiences which, since 2005, were articulated in a Regional Program under the coordination of UN Women Andean Sub-Regional Office located in Quito⁸.

In Bolivia, the experience started in 2001 by gathering experts in economy and public budget management as well as activists with expertise in gender equality and knowledge on women's rights to train them in GRB and analyze national and municipal budgets from this approach. This first exercise was the beginning of an experience that has been implemented for over 12 years and that has made the following contributions: the promotion of gender institutionalization in public policies and budgets through proposals to influence fiscal policy regulations and budget planning and formulation for national and international entities; the strengthening and development of women's capacities as well as the strengthening of their organizations to promote their participation, their following up capacities and social control strategies in public budgets; and the development of gender-responsive analysis in public budgets through research and knowledge development on fiscal policy, feminist economy and gender-responsive budgets in universities and institutional spaces.

1.2 Categories of gender equality investment within GRB's ●●

The interest in public budgets opened a new field of possibilities for women's movements that were carrying out actions in different countries to promote public policies for gender equality and women's rights, as well as for the work of cooperation agencies and public institutions. A main drive for working GRBs in the region was to prove that there was a significant gap between the commitment that

8 The program was developed between 2005 and 2012 in Argentina, Bolivia, Brazil, Colombia, Ecuador, Honduras, Peru, Uruguay, and Venezuela.



governments assumed with regards to gender-equality laws, policies, plans and demands and the effective allocation of resources in their planning and budget processes to make them effective.

In the case of Bolivia, the first analysis of national and municipal budgets, carried out in 2001, proposed to develop elements to influence the policies and amend public budgets in order to promote gender equality. To achieve this a *...methodology that transcends the criteria of accounting for allocated expenditure to equitable gender actions. The analysis of the structure of the budgets aims at identifying amounts, types of expenditure and the effects that they have as well as relying on useful elements to formulate new policies that are translated into new expenditure structures within the framework of a fiscal and macroeconomic fiscal stability*⁹.

As of that year, considering the progress and experiences achieved in other countries and continents, the Bolivian process set certain milestones that enabled the advancement in the analysis and the development of GRB instruments¹⁰ and, based on the daily practice of incidence and theoretical reflection, developed categories and indicators for the analysis and orientation of public investment for gender equality, which became one of the most important characteristics of the work in the country.

Categories are instruments that embody a necessary articulation between a conceptual level and an operative level; they enable demanding that core development actions be addressed to become co-

9 Marta Gutiérrez: *Public budget with a gender approach A methodological approximation for the National Government Budget of Bolivia and the Municipal Budget of Municipal Government of La Paz*. UNIFEM, 2002.

10 Carmen Zabalaga E.: *Sistematization of the experience: "Categories for the analysis and orientation of public investment in gender equality"*. UN Women 2012.

responsible in the process of life reproduction and to focus on people's quality of life and on eliminating inequalities. Likewise, they facilitate the analysis of annual and multi-annual plans and public budgets from the perspective of gender equality investment by consolidating a common understanding of what this means; contributing to the analysis of budgets; providing guidelines to organize the information to avoid exiguity, dispersion and invisibilization of gender equality in public budgets.

On the other hand, categories have become instruments that, by generating information and providing orientation, stimulate incidence towards the mainstreaming and institutionalizing the gender approach in national and local laws, policies, plans and budgets; they promote transparency; and facilitate accountability.

2. GENDER EQUALITY INVESTMENT CATEGORIES

As mentioned above, the analysis of gender-responsive budgets was based on a set of tools and procedures that enabled conducting different analysis processes in different countries, recreating methodologies or creating new ones that can be adapted to each country.

In the case of the experience of analyzing both the national and municipal budgets in Bolivia in 2001-2002, the **tagged expenditure methodology** suggested by Rhonda Sharp was adapted as one of the tools for public budget analysis, which proposes three categories:

Category 1: Government expenditures intended to cover specific needs of women and men in the community.

Category 2: Public expenditure to promote equal employment opportunities among government employees.


Category 3: Government agencies' general budgetary expenditure that make goods or services available to the community but are not assessed for their gender impact.

This notion of **expenditure categories** was implemented and further extended in Bolivia considering two essential elements that are at the basis of what are currently considered as investment categories in gender equality: The first element defined categories that facilitate the acknowledgement of a political vision to transform the lives of women as well as the gender relations in society, taking into consideration the

inequality gaps and issues of discrimination and oppression against women. **Three categories were initially developed:**

- i. Focused investment:** Expenditure addressed to women to close inequality and inequity between women and men and to generate conditions to exercise women's social, economical, and political rights;
- ii. Investment in public services for family care and labor force reproduction:** Expenditure addressed to the promotion of social and public responsibility in family care and development (children, adolescents, the elderly and people with different capacities) to liberate women from traditionally female obligations and expand their opportunities of training, working, political participation, health, recreation, etc.
- iii. Investment in an equality culture:** Expenditure addressed to change society's way of assessing productive and reproductive work; the predominance of men over women and power relations (domination–subordination) to enable women and men decide on their future and that of their community on a fair and equitable way; and to disseminate and guarantee conditions for equal rights responsibilities between women and men at home, in the community, and in the municipality.

In order to arrive to the categories as presented in this document, we took into consideration seven important moments¹¹ that were tested and outlined according to the needs that emerged from the work on GRB with women's organizations and to the political position assumed by the members of the National Working Group on gender-responsive budgets (MNT- GRB) in the social and political context of the country.



Although the second element was initially designated as **gender-expenditure category**, referring to performance expenditure and investment expenditure, later, due to the connotation of the term 'expenditure', efforts were made for all public expenditure in gender to be considered an *investment focused on persons*. Therefore, the term **gender investment category** was adopted as an equivalent of the concept of expenditure that includes performance and investment expenses. We must note that the experience has not yet worked with the income budget, this challenge was assumed in Bolivia in 2012.

Additionally, as a result of the collective building experience with women's institutions and organizations, national, local and municipal public gender instances. The categories became a theoretical and operative tool to **analyze** policies, plans, and budgets to **channel** public budgetary demands and allocations in order to **influence** public policies, fiscal and budgetary regulations and to **question** the vision and dimensions of development and the concept of Good Living.

The theoretical-conceptual development of categories in the framework of GRB takes as reference feminist economy principles, social reproduction and life care, and de-patriarchalization in the context of the Good Living paradigm, considering that all these concepts relate to each other because of their comprehensive nature and their articulation in the productive and reproductive fields.

The categories are based on the proposal to promote a paradigm and public policies that define:

- The magnitude of social reproduction of life in development and the need for human beings and nature to live in harmony;
- Economic and fiscal policies as axes for the production and distribution of wealth within a framework of social and gender justice.


And they are placed in the dimensions that interact with the concept of life as a whole:

- The subjective dimension of affection and care
- The social dimension and inequalities
- The economic dimension, production, and life care and sustainability
- The political dimension and power relations
- The cultural dimension and the symbolic system.

The gender investment categories that are currently used are:

- Women-focused investment category (WF)**
- Investment in social and public co-responsibility for life care and sustainability category (LCS)**
- Investment in an equality culture category (EC)**
- Redistribution for social and gender equality category (RSGE)**

The operative development of the categories within the GRB framework includes theoretical and political elements that account for the causes and effects of social and gender discrimination, considering the central axes of women's subordination, exclusion and discrimination in the first three categories: women's body and autonomy; sexual and hierarchy-based division of labor; and discriminating cultural patterns. The axis of poverty or disadvantageous social and economic



conditions was considered for the fourth category and a specific context was analyzed in the attempt to transform the situation of discrimination and exclusion and channel public policy answers to transform inequality.

a. Women-focused investment category (WF)

In our societies, the sole fact of being a woman is a condition of discrimination and inequality. Inequality between men and women, built upon an uneven and hierarchy-based allocation of roles and functions of men and women is a cultural pattern that comes from the traditional exercise of power. This inequality, presented as a “natural” fact based on the sexual difference, crosses all fields of the daily personal, family, economic, political, social, cultural and ideological life and is found in all cultures, all social classes and all societies, assuming the characteristics of each socio-cultural context. This naturalization of inequality has left women without the conditions and opportunities that men have to exercise human rights¹².

Although statistics are often deficient, they can currently provide data on the existing gaps between women and men and among women of different social sectors. However, such inequalities that cross all fields of life are not “official material”, i.e., they are not “recorded” at the time of defining public policies, government administration systems and public budgets. Women’s inequality, discrimination, and oppression in all sectors, particularly when ethnic-cultural conditions, age, sexual choice and other factors that make inequality situations more complex, make it more difficult for the State to oversee this situation and to address policies and budgets to eliminate inequality. When we

12 Silvia Fernández (2009): “Gender responsive budgets in Bolivia: Indicators for a gender responsive budget and a budget for families”.

talk about focusing politics and budget allocations in closing gaps between women and men, we are demanding that the State assumes the responsibility of tackling the causes that generate these gaps from a vision of co-responsibility in the reproduction and care of life in all its dimensions.

Women-focused investments, objectively, involves taking action to develop budgets for all women and girls to be able to participate in the cultural, economic, political and social development; allowing women to contribute and enjoy this process in equal conditions; allow women to develop autonomy as a social and community actor; and allow women to fully exercise their rights. In this sense, women-focused investments seek to close gender gaps and overcome the different forms of discrimination, exclusion, and subjection in the framework of the transformation of gender systems, i.e., specific ways in which patriarchy is expressed in different contexts.

Discrimination against women "shall mean any distinction, exclusion or restriction made on the basis of sex which has the effect or purpose of impairing or nullifying the recognition, enjoyment or exercise by women, irrespective of their marital status, on a basis of equality of men and women, of human rights and fundamental freedoms in the political, economic, social, cultural, civil or any other field." CEDAW.

1.1 Definition of the Women-Focused Investment Category (WF)

This category designates public investment in programs/projects and/or services addressed exclusively to women in the different phases of the life cycles. This investment aims to close inequality gaps between women and men and to promote autonomy and the

exercise of women's rights. This investment is composed by positive, compensatory, or special promotion action measures:

Positive action measures are construed as such special temporary measures intended to accelerate de facto equality between women and men, and shall end when the goals of equality are attained.

Not all public policies that target women as a group involve an investment in gender. A women-focused investment designed from a traditional patriarchal approach ("*arroz con leche*" projects)¹³, lacking gender sensitivity will surely perpetuate gender roles and stereotypes and will not show any real progress in overcoming the living conditions and inequalities that affect women.

Once the situation of inequality that affects women of different age groups, economic-social conditions and/or ethnical-cultural roots is verified, women-focused investments can be understood as investments that contribute to generate opportunities for women in political, social, economic and employment spheres and in strengthening their autonomy and the fulfillment of their rights.

Gender inequality gaps are the difference and the distance that exist between women and men in terms of how they exercise their autonomy, the achievement of human rights and their access to the opportunities and benefits of development.

13 (*Rice pudding*) An expression used by Mirela Armand Ugon that refers to the children's game "*arroz con leche me quiero casar...*" (*rice pudding, I want to get married...*) for projects built with a patriarchal and sexist vision of society where housework is exclusively assigned to women, that reinforces stereotypes and aims at women "complying better" with their traditional roles, i.e., they lack a more comprehensive vision that enables overcoming gender gaps.

1.2 Type of Indicative Actions Included in the Women- Focused Investment Category

In the field of regulations

- Legislation providing positive action measures to revert situations of inequality or discrimination that particularly affect women, e.g., the law against political harassment of women or the law on quotas.

In the field of social and political participation and women's exercise of citizenship

- Projects to promote women's social and political participation and the fulfillment of their rights.
- Projects or programs to strengthen and educate women in the development of leadership capacities.
- Training and strengthening programs for women politicians and/or women in decision-making positions.
- Projects to support women's organizations strengthening.
- Forums organized for dialogue and agreements between women from social organizations and other social and political stakeholders.
- Training centers, union headquarters or other kinds of women organizations' infrastructure.
- Projects or programs that contribute to women's exercise of citizenship, i.e., provision of birth certificates, identity cards, electoral registration or others.

In the field of the economic/productive and employment development for the exercise of women's economic rights and autonomy

- University level and technical training for women, particularly in non-traditional careers or specialties.
- Projects promoting women's employment.
- Programs aimed to educate and strengthen women's economic-productive activities, micro and small individual, associative and community own companies to articulate to the local economic network.
- Information, advising and follow up of services for women in labor rights, sexual harassment and work harassment.
- Programs for women's technical training in product processing, transformation, and commercialization.
- Women's access to financial services (advising on access to credit for women who save) and non-financial advising (technical advising services).
- Technical assistance to women's organizations to prepare and negotiate economic-productive projects and initiatives in different environments and in equitable conditions with other stakeholders.
- Projects to guarantee women's ownership and their access to land and production means.
- Programs to implement measures for risk control in formal and informal workspaces and rural and urban productive activities that mainly affect women.

- Projects to recover ancestral knowledge of women in the field of seed selection and storage as well as in agricultural production.

In the field of access to services and benefits

Women's access to health

- Programs of breast and cervical-uterine cancer detection.
- Programs and services of sexual and reproductive health specially oriented to young women, women with disabilities, sexual diversity or women who live with HIV-AIDS, according to the cultural contexts.
- Programs addressed to prevent and reduce maternal mortality.
- Programs to prevent teenage pregnancy.
- Culturally sensitive programs and infrastructure of maternal health to improve service quality and care by articulating occidental and traditional medicine.
- Mothers and child health (in the case of Bolivia Mother and Child Universal Health Insurance considering aspects that exclusively reach to women).
- Projects aimed to recover women's ancestral knowledge in the field of food and health.

Access to education

- Literacy programs addressed to women considering their specific characteristics and needs.

- Programs for girls and female teenager permanence in the education system.
- Programs that promote high-school and university education.
- Projects to recover cultural women's ancestral knowledge in weaving as well as their cosmo-vision.

Social services and citizen security

- Programs to assist women living in the streets and/or in vulnerability situations.
- Infrastructure for shelters and support services for women victims of violence.
- Programs of work insertion for gender-violence victims.
- Programs and services to promote citizen security for women.

Housing

- Programs that facilitate and guarantee women's access to home-ownership.
- Housing access programs for single-parent families, mothers and grandmothers heads of families.

b. Category - investment in social and public co-responsibility for life care and sustainability (LCS)


According to the feminist economy analysis, the root of oppression and discrimination towards women is found in the sexual division of labor between women and men, its characteristics, the opportunities that it generates, the underlined capacity of mercantile and non-mercantile production of goods and services, the conditions of gender oppression and inequality of the economic, social, and reproductive spheres¹⁴.

It is important to acknowledge the fact that women assume a dual role in their families and in the productive sphere. This has an effect in different economic aspects: formal, informal, urban, and rural – agricultural and community spheres. Women face the problem of “conciliating” time and work by adjusting different variables between the rigorousness of both jobs: in one hand the human needs (biological and relation) and in the other the economic-productive needs, with significant costs, particularly for women and their quality of life. This conciliation process has forced women to develop different strategies for individual resistance related to reducing family work, organizing care among women, and specific ways of integrating to the labor market and developing economic activities.

By assigning women exclusively to the reproduction and care spheres, while they simultaneously carry out economic and labor activities, the topics of time, the valuation of productive and reproductive work,

14 Carrasco, Cristina (2001): “Sustainability of human life: ¿A women’s matter?” *Mientras Tanto* Magazine, N° 82. Icaria Editorial. Barcelona, mentioned in the “Guide for the incorporation of the gender approach in the construction of productive municipalities: Methodology of Gender Approach. Carmen Zabalaga - Proyecto HUEMP 2005.





and social participation appear in the equation. Cristina Carrasco¹⁵ states that time in work is a matter of current discussion with significant interest due to two facts: women's growing participation in the labor market – which has made visible the tension between times for care (at home) and the demands of commercial work –; and time flexibilization of the imposed working times, which demand increasingly more mobility and time availability to women and men workers.

On the other hand, the problems arisen in relation to work times are derived from the conflict which lies at the basis of the social and economic system, i.e., the existing tension between two contradictory goals: obtaining benefits, on one hand, and care of human life, on the other. The author states that this tension rose with the dependence of capitalist production on human life reproduction and sustainability. The more the State reduces investment in social services, health, and care, the more load women bear at home to sustain human life.

This topic proposes deep reflection on how societies deal with human life care and sustainability, which is directly related to women's work and time. For the official economy this topic has never been a central matter of concern and analysis, but has been usually considered an “externality” of the economic system¹⁶. Besides, human reproduction as a social process has never been used as a core analytical category in society studies.

Nevertheless, according to feminist economics, **unpaid social reproduction work** needs to be conceptualized in the economic

15 Ibid.

16 Neoclassical theory has traditionally considered family as something “exogenous” to the economic system – something that evolves independently from economics. (Quoted in Carrasco Cristina, *La sostenibilidad de la vida humana: ¿un asunto de mujeres?*)

system in order to adequately include its dimension and quality. The contents of such work is caring for household space and goods' maintenance, as well as care of bodies, education, formation, social relations maintenance, and the psychological support to the members of the family.

The amount of this work, measured in physical time units, slightly exceeds the total paid work of both men and women¹⁷; while in relation to quality its characteristics are essential to keep the sustainable conditions of the system as a whole. Therefore, it is one of the economic system's most significant aggregates and holds a central position in the population's social reproduction process by interacting with the role of public services and the production of goods and services that are necessary for the population's survival.¹⁸ Nevertheless, the way it is currently distributed in society and the division between men and women in spaces of daily cohabitation constitute the core difference of gender.

Consequently, feminist economics sets human life reproduction at the core of its concerns. According to Carrasco, raising the topic of the reproduction of living conditions of men and women from this perspective *implies giving another meaning to terms such as 'work', 'productivity', 'efficiency', etc.; building new theoretical frameworks incorporating the different activities that contribute to the*

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- 17 "The data and studies on the use of time show that it is reductionist to think that the only persons who profit from household work and care services are children and the elderly. Behind weak persons are also strong individuals, particularly adult males, who use women's household work and care as a fundamental support to sustain life, not only in times of crisis, but also, and above all, in normal daily life." Quoted in Picchio, Antonella (2001): *Un Enfoque Macroeconómico «Ampliado» de las Condiciones De Vida*. Department of Political Economy of the University of Modena.
- 18 Picchio, Antonella (2001): *Un Enfoque Macroeconómico «Ampliado» de las Condiciones De Vida*. Department of Political Economy of the University of Modena.

*aforementioned goal; collecting new statistics, building new indicators; discussing economic policies in other terms; in definitive, changing the perspective of analysis, acknowledging and appraising unpaid work that is traditionally performed by women and whose direct goal is the care of human life.*¹⁹

The goal of household work²⁰, unlike merchandise production, is to reconstruct a relation between production and reproduction in a way that is meaningful for the persons; it is about the wellbeing of persons and it should be the fundamental goal to be attained, but as a social problem and not as a private concern of women.

Antonella Picchio points out that wellbeing has multi-dimensional contents that are not restricted to the possession of monetary values, but that remit us to an effective activation of vital functions, such as knowledge, the capacity of maintaining social relations and enjoyment of health conditions, being or not educated, the access to resources, to free time, the shared responsibility in reproduction and care, moving in the territory and self-care of women and men. This broad and multi-dimensional vision of wellbeing also includes the need for a harmonic relation with nature.

Additionally, the collective liability in reproducing the living conditions favors resizing work devoted to protect life and considering household and home care as the work that generates non-monetary value for life, with which the concept of work as the production of goods and

19 Cristina Carrasco C. , *La economía feminista: una apuesta por otra economía.*, 2005.

20 Picchio Antonella 1994: *The Reproductive Work, a cenral issue in market analysis*, in: Women and labour: conceptual-ruptures. GEM-LAC, quoted in Module de of Des-patriarchalization and De-colonization, Policies and GRB. Colectivo Cabildeo – Curse for the Public Administration School of the Plurinational State of Bolivia, 2011.

services for the market is extended to the value of the reproduction of life and source of egalitarian redistribution.²¹

Therefore, social reproduction work, care and sustainability of life must be the joint responsibility of the State, society, the community, and the homes (and inside these, both men and women.) Accordingly, at the time of analyzing and orienting investment for gender equality and equity it is essential to make visible the contributions of the State to such co-responsibility.


a. Definition of the category of social and public co-responsibility and life care and sustainability (LCS)

Public investment that promotes the co-responsibility of the State, the society, the community and all the members of the family in the labor of social reproduction and life care and sustainability to generate the material and cultural conditions for the best possible distribution of household tasks and duties related to the care of all members. This investment must contribute to the reduction of unpaid household workload and care performed at home largely by women and to liberate part of their time to expand their opportunities to exercise human rights and to *Live Well*.

This category deals with investment in policies, programs, projects and/or public services addressed to social reproduction, life care and sustainability, taking in consideration the corporal, material,

21 Picchio, Antonella (2001): *A "Broader" Macroeconomic Approach of Living Conditions*. Political Economic Department, University of Modena, quoted in Module de of Despatriarchalization and De-colonization, Policies and GRB. Colectivo Cabildeo – Curse for the Public Administration School of the Plurinational State of Bolivia, 2011.





emotional, affectionate, and time-use in topics related to growth, recreation, protection, and care of persons – including specific actions for those who need more time for care (children, teenagers, the elderly, and persons with different abilities), as well as facilitating the care of people who are close and self-care. It also deals with care and protection work of other living beings who are part of the reproductive sphere of life, i.e., care of animals, seeds, plants, medicine plants, etc., which in rural agricultural-based economies mainly fall on women.

b. Types of indicative actions included in the category of social and public co-responsibility of life reproduction

i. The scope of laws, rules, policies, and plans

- Policies on maternity and paternity leave permits covered by the State.
- Labor policies and laws to facilitate the conciliation of the times in order to balance paid and unpaid labor of men and women.
- Measurement and research on the use of time and its incorporation in national and local statistics and accounts.
- Dissemination and promotion of the enforcement of legislation regarding paid household work.

ii. The scope of programs and projects and services in this category

- Children's education centers for boys and girls who are not in age of starting compulsory education.

- Mandatory children's daycare in work centers with more than 15 boys and girls.
- Programs for the use of free time during the school year and vacations for children and teenagers.
- School transportation services.
- Public transportation services to improve the communication and reduce the time to access health and education centers and to basic products markets.
- Programs to reduce the time used in administrative procedures to have access to basic goods and services (water, electricity, telephone, health, education).
- Programs that guarantee school meals and food facilities at the worksite.
- Programs on work training and care to the needs of persons with different capacities.
- Programs on occupational therapy for senior dependent persons.
- Implementation of collective infrastructure and services (community dining rooms, public laundries, solid waste recycling).
- Programs to strengthen families and community networks for children's care and raising to recover knowledge and cultural practices.

- Construction of strategies for inter-generation relationships, particularly from the cosmo-vision of the indigenous peoples.
- Support programs (including economic opportunities) for families that risk abandoning daughters and sons.
- Programs to sensitize people on shared responsibilities between women and men in household work and family care.
- Training and/or sensitization exclusively addressed to men on family care work.
- Promotion of research and information collection on unpaid household work and the use of time.

c. Category - investment in a culture of equality (CE)


Besides the forms in which sexual division of work and the social organization of life care and sustainability, as well as the way how opportunities, resources and power are distributed in a society, gender inequalities are related to a set of rules and values that influence practices, customs, and forms of interpersonal and social relations. Within the patriarchal system framework, these cultural patterns determine rigid gender stereotypes and they also build the male and female models in unequal conditions. It is precisely in these cultural rules and patterns where the force of patriarchy lies as a structure that grants men (as males) the right to exercise power over women, children, and over matters that concerns society as a whole. Patriarchal dominance is expressed in multiple systems and structures

that compose a society (economic and social relations, in juridical, ideological, and political relations, in unwritten rules of human cohabitation); at the same time, patriarchy gains new significance with time in every place.

Patriarchal System or Patriarchy

- “A way of political, economic, religious and social organization based on the idea of male authority and leadership... *that at the same time creates a symbolic order through myths and religion, which perpetuate it as the only possibly structure.*” Reguant, Dolors (2007)
- It is a “social hierarchic structure based on a set of ideas, prejudice, symbols, customs, and even laws related to women whereby the male gender dominates and oppresses female gender.” (Montero y Nieto, 2002).

Among the factors that sustain patriarchy are: a vision of the world based on the male point of view; the naturalization of male supremacy and women’s subordination, thus from the differences between both; control of the body of women of all ages sexuality, reproduction, etc.); violence, force, and fear to keep and reproduce gender privileges; sexual division of work; ideas, stereotypes, rules, languages, and practices that statically define the “ought to be” of women and men; the criteria of femininity and masculinity; mandatory heterosexuality; what is permitted and what is forbidden; as well as social institutions that promote and reaffirm these androcentric and patriarchal rules and practices, including education, religion, family, and the State.



In order to promote an equality culture and the exercise of the rights of women and men, it is necessary to acknowledge a democratic system in society, as well as to generate the conditions for accepting differences in equity, without hierarchies. The phenomena of discrimination, subordination, and violence against women based on gender are present in our society, and are intensified with the convergence of ethnical-cultural and class factors. Therefore, developing a culture of equality implies seeking structural changes, not only from the vision of gender, but from all types of discrimination and expressions of racism and colonialism that exist in our society.

In the context of the construction of democracy, it is not possible to understand the society; the State or the family by leaving out the domination and the power exercised upon the majority of women. Therefore, the proposal of decolonizing the State and society must include the approach of depatriarchalization as an intrinsic but specific element that needs precise policies and actions to promote structural changes that deconstruct the mechanisms of patriarchal dominance.

Removing these cultural patterns from society is also a responsibility of the State in terms of creating the conditions (laws, rules, policies, programs) for a dignified life for women and men; and promoting changes towards a culture of equality, eliminating stereotypes, beliefs, and cultural patterns of inequality, such as the above-mentioned acknowledgement of women as mothers, wives, or housewives only, passive receptors of social assistance; ignoring the different needs and demands of men and women; ignoring the different consequences of policies, programs, projects, and budgets in the lives of women and men in all segments of the population.

a. Defining the Category of a Culture of Equality

It refers to public investment that promotes structural changes in the patriarchal system, in public administration and power relations between men and women. It includes actions intended to generate changes in the institutionality and public administration (regulations, policies, planning, and structure) and in the way of thinking and acting in society and its institutions to reach social, ethnic, and gender equality; to reach social, ethnic, and gender equality; and to change the social and cultural imaginaries, as well as the relations of power between women and men and between generations.

This category deals with public investment in programs, projects, and/or services intended to modify values, ideas, beliefs, and practices; the flexibilization of social roles and stereotypes that reproduce gender, class, and ethnical discrimination; through the change of imaginaries, those that promote women's autonomy, the exercise of their sexual and reproductive rights, the effectiveness of their political rights, the guarantee of a life free of gender violence, as well as the guarantee of the necessary institutionality and support to sustain gender policies in public instances.

b. Type of indicative actions included in the Category of Investment in a Culture of Equality

i. The scope of policies, regulations, institutionality and public management

- Design, approval, and implementation of laws, regulations and other rules that promote gender equality and/or guarantee the rights of women.




- Laws that mainstream the approach of gender; promote equality between women and men or promote depatriarchalization processes.
- Laws and rules that guarantee the exercise of sexual and reproductive rights of persons.
- Design of equality and/or depatriarchalization plans.
- Design and implementation of planning and budget rules that allocate public resources gender equality and women's rights.
- Creation and functioning of a decision-making institutionalized instance responsible for gender and/or depatriarchalization policies.
- Creation, institutionalized functioning and/or improvement in the quality of services aimed to prevent, take care of, and punish household and gender violence, particularly in relation to women victims of violence (Legal Integral Municipal Services-SLIM, in the Bolivian case).
- Projects to improve the infrastructure and services of family protection brigades, women's commissary stations or similar instances and/or other institutionalized citizen security services that expressly state actions to prevent, pursue, and punish any form of violence against women.
- Support and coordination programs and/or joint activities between instances to take care of the problem of violence against women (municipal, local, police, judicial).

- Programs for care and/or services to promote and facilitate the exercise of sexual and reproductive rights.
- Training aimed to women and men public officials in charge of developing policies and rules intended to generate a culture of equality in society.
- Training aimed to women and men public officials in policies, programs, and budgets on gender equality.
- Technical support programs to mainstream the approach of gender in the different instances and levels of the public structure.
- Research, studies, and others to support the participative design of policies and strategies on equality between women and men and/or depatriarchalization strategies.
- Programs to disseminate the Law on Political Harassment against Women.

II. The scope of cultural patterns and practices

- Programs to prevent gender violence considering class and ethnic factors with an inter-legal and inter-cultural approach.
- Projects to disseminate and sensitize on the sexual and reproductive rights of the persons.
- Programs to promote women's autonomy and exercise of rights, particularly their sexual and reproductive rights.
- To disseminate and sensitize on the equality of right between



women and men in the family, the community, and the municipality.

- To promote a non-sexist communication free of gender stereotypes, particularly in the media.
- Campaigns to promote equal pay for equal work.
- Programs to disseminate citizens' security taking into consideration prevention actions that include the structural causes for this type of violence against women and girls.
- Programs to develop the education curriculum with contents of equality.
- Programs to sensitize and train in a culture of equality in schools and educational centers.
- Programs to prevent violence in schools and educational centers.
- Programs to recover ancestral cosmo-visions and social practices that promote equality, reciprocity, and solidarity.
- Forums for dialogues and agreement between women's social organizations and other social and political stakeholders.
- To promote cultural and artistic creative activities of women of different ages and social-cultural conditions.
- Programs for sports activities to contribute to soften gender roles and *depatriarchalize* the relations between women and men.

d. Category - redistribution for social and gender equality (RSGE)

We are undergoing a deep crisis that will severely endanger the living conditions of a significant part of the world population. This crisis will basically affect such persons – the majority – who directly or indirectly depend on a wage to survive. Unemployment, insecurity, and the limited social protection may increase poverty and or social exclusion in a short term²².

One of the main functions of the State and its different government levels is the redistribution of social power, economic resources and life opportunities. To this end, public policies are used as instruments to mediate between the State and civil society; these instruments express redistributive actions developed by the State in its relation with society. This instrument must be used, among other purposes, to revert social and gender inequalities in spite of the challenge of keeping and increasing the growth rate in a stable and balanced macroeconomic climate.

Even when public resources that are intended to redistribution and are focused in sectors with disadvantageous conditions do not take into consideration gender-differentiated needs, they can result in positive impacts for women. This is so because of the inter-linking between the gender system and the poverty conditions; such intersectionalism is expressed in phenomena such as the feminization of poverty. There is, thus, a set of policies and programs oriented to overcome poverty; although not included in any one of the former three categories of investment in gender, they must be considered since in societies with high social-economic differences, the poorest are the women.

22 Cristina Carrasco, *Women Sustainability and Social Debt*, 2009.

a. Definition of the Category of Redistribution for Social and Gender Equality

This category refers to public investment intended to redistribute public resources to improve the living conditions, the exercise of human rights, and poor people's access to Living Well. This investment indirectly contributes to improve women's living conditions and expand their opportunities to exercise their rights.

It deals with investment in programs, projects and/or services that are not focused on women or gender equality, but that contribute to improve women's living conditions since they eventually favor the reduction of gaps and overcoming social inequalities, whether in education, health, nutrition, basic social services, sanitation, access to drinking water or to land, production means and housing, and the exercise of political rights and citizens' participation. While this type of investment is positive, it is not enough to advance to gender equality on a sustainable basis. Therefore, this category also includes investment focused on programs, projects, and/or services intended to reduce and eliminate social inequalities that intentionally mainstream²³ the gender approach. The projection is that all future redistribution policies for social equality incorporate the gender approach.

b. Types of indicative actions included in the category with indirect benefits for women and/or gender mainstreaming

- Construction, expansions and maintenance of drinking water system and networks with different culturally and geographically adapted (home, cultural, public fountains, etc.).

23 Mainstreaming: The policies on equality are effective when they include all politically and technically liable persons and when they pretend to undertake the different aspects of inequality, expressed in its goals, objectives, actions, and indicators. We call this property of the policies "mainstreaming". Source: Celia Valiente Fernández 1998.

- Garbage collection system and coverage.
- Implementation of piped gas services.
- Citizen's security services.
- Literacy, post-literacy, and alternative education projects.
- Projects aimed to promote and guarantee children's permanence in school: elementary and high school boarding schools, school permanence bonus, school breakfast, scholarships, etc.
- Construction, implementation, equipping, maintenance of reproductive health infrastructure, such as maternal-children's hospitals, maternity houses, health centers, etc.
- Projects to guarantee the basic conditions for an equitable exercise of political rights: identification processes, mixed leadership training, development management, etc.
- Employment generation programs that include women (PLANE, My First Dignified Job, or other municipal programs).
- Land ownership programs.
- Programs on housing access and/or improvement.
- Productive, food safety, and environmental projects that take in consideration the differenced needs and impacts of gender.



2. Example: application of the categories of investment in gender equality through public budget analysis indicators

In order to facilitate the use of the categories, we are summarizing the public budget analysis methodology by applying the categories of management indicators developed in the Bolivian experience.²⁴

The indicators exclusively refer to the annual budgetary distribution and performance. They focus on the topic of public investment and its contribution or non-contribution to gender equality; they also assess its proportion within total public investment.

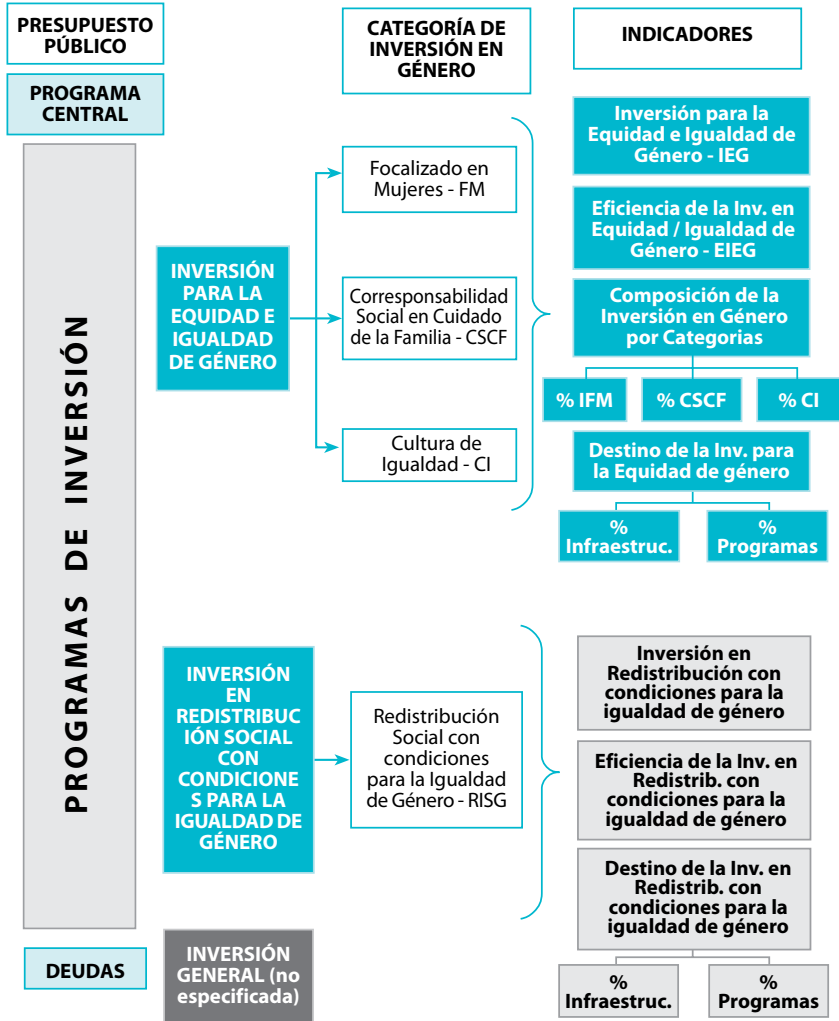
These indicators account for the real efforts made at different public levels and instances to redistribute resources equitably; improve the access to goods and services; and develop capacities that influence the comprehensive approach of life care and sustainability, the construction of gender equality, and progress in complying with the rights of women. The diagram bellow shows the group of investment categories and the indicators used.

Please note that in order to carry out a gender analysis of public budgets, it is necessary to have information on the last programmed or reformulated budget, as well as on the budget implemented by each entity in a set period. This information must contain the following

24 The methodology on how to use gender indicators based on the categories is described in *Guía de Recojo y Sistematización de Información de Género en Presupuestos Municipales y Prefecturales*, published by the Vice Ministry of Equal Opportunities in 2009, with the support of UN Women. Originally, the indicators were designed by Silvia Fernández and Martha Lanza from Colectivo Cabildeo within the framework of UNIFEM-RA GRB Program, 2006. They were developed in the Gender Observatories of Femenine Institute of Integral Training (IFFI) since 2007, with the collective support from Mirela Armand Ugón, Tania Sánchez, Silvia Fernández, and Carmen Zabalaga.

disaggregated data: program, sub-program, project, activity, description, current budget according to the entity and implemented or accrual budget (in public entities, the return requires the entity's real budgetary performance).

GRB CATEGORIES & INDICATORS²⁵



25 Taken from the Gender Equity Observatory: *Presupuestos sensibles al género análisis de presupuestos municipales 2007*. IFFI amended with the new categories presented herein.

Operative-financial management performance indicators. The purpose of the indicators of investment in gender equality is to evaluate the significance of reducing gender gaps in public entities; the construction of gender equality and generating conditions for life care and sustainability. They answer the question: **“What will the entity do or has done in managing gender equality, life care and sustainability with the resources it has available?”**

INDICATOR: INVESTMENT FOR GENDER EQUALITY - IGE

This indicator measures the magnitude and performance of investment in gender equality expressed in a percentage (%) of the budget implemented in investment projects (considering the following categories: women-focused, social and public co-responsibility for life care and sustainability, and culture of equality) regarding the total implemented investment (investment programs), excluding debts.

$$IEG = \frac{\text{Total Implemented in Gender (WF + LCS + CE)} \times 100}{\text{Total Investment (public instance) implemented}}$$

Indicator: efficiency of investment for gender equality - EIEG

This indicator measures the budgetary performance compared to the total amount implemented in the programmed activities for gender equality, as expressed in the following formula:

$$EIEG = \frac{\text{Total Implemented in Gender (WF+LCS+CE)} \times 100}{\text{Total Programed in Gender (WF+LCS+CE)}}$$

INDICATOR OF THE COMPOSITION OF GENDER INVESTMENT

This indicator analyzes how investment is distributed for the

implementation of gender equality among the different categories of investment in gender.

$$\text{Women-focused investment \%} = \text{WF} \times 100 / \text{IEG total}$$

$$\begin{aligned} \text{\% investment in social \& public co-responsibility for life care} \\ \text{and sustainability} \\ = \text{LCS} \times 100 / \text{IEG total} \end{aligned}$$

$$\text{\% investment in the culture of equality} = \text{CE} \times 100 / \text{IEG total}$$

Indicator of investment in redistribution for social and gender equality - RSGE

This indicator refers to the budget implemented in redistribution projects for social and gender equality regarding the total implemented municipal investment, excluding debts.

$$\text{IRSGE} = \frac{\text{Total Implemented in RSGE} \times 100}{\text{Total Investment (public instance) implemented}}$$

Indicator on the efficiency of the investment in redistribution for social and gender equality (ERSGE)

This indicator measures the budgetary performance as compared to the implemented amount related to the investment programmed in redistribution for social and gender equality, expressed in the following formula:

$$\text{ERSGE} = \frac{\text{Total Implemented in RSGE} \times 100}{\text{Total Programmed in RSGE}}$$

Example of indicator appraisal and municipal ranking in Bolivia

Once the indicator matrix is developed, municipalities are classified in colors according to the following two thermometers: Investment in gender (IEG); and Performance or efficiency of the investment in gender (EIEG.)

The process of mainstreaming gender in public planning and budgets has started, but time is still needed to strengthen the concept. From women's point of view and in order to advance towards overcoming gender inequalities, the goal is that increasingly higher percentages of the budgets be devoted to these actions with a clear gender policy. The Investment Thermometer instrument is demanding in what concerns percentages; however, considering the new State Political Constitution, the National Development Plan and the Equal Opportunities Plan, public policies must include the necessary and sufficient resources to implement the principles set forth in these rules.

Based on an analysis performed in municipalities of Cochabamba, in accordance with the current reality and with the aim to encourage public women and men officials in their efforts to incorporate the gender approach, we propose a preliminary scale to compare investment in gender among the different municipalities.

Thermometer for the Gender Equality Investment Ranking

BLUE	Above 20%	Excellent: The public entity systematically adopts policies that promote gender equality
GREEN	From 10 to 20%	Good: There is clear political will and actions are performed in the different categories of investment in gender.
YELLOW	From 5 to 10%	Acceptable: There is political will expressed in resources allocation in some programs/projects that favor gender equality.
ORANGE	From 2 and 5%	Weak: There is some interest but actions are isolated and/or lack a clear gender approach.
RED	Less than 2%	Critical: There is insufficient interest in promoting gender equality.

The thermometer gives an idea of the political will expressed in the budgets. After calculating the indicator of Investment in Gender Equality, the table gives a quick view of where we find the main progress and what entities are not undertaking the concept.

We consider that this tool is insufficient and perfectible according to the changes made in public policies. Likewise, the behavior of public investment in the different categories of investment in gender should be analyzed with different measuring scales.

On the other hand, by taking as reference the parameters used by the *National Observatory of Democracy in Bolivia* to evaluate the performance of municipal investment, we will apply the following table to qualify the performance of investment made in Gender Equity in the different State instances and levels.

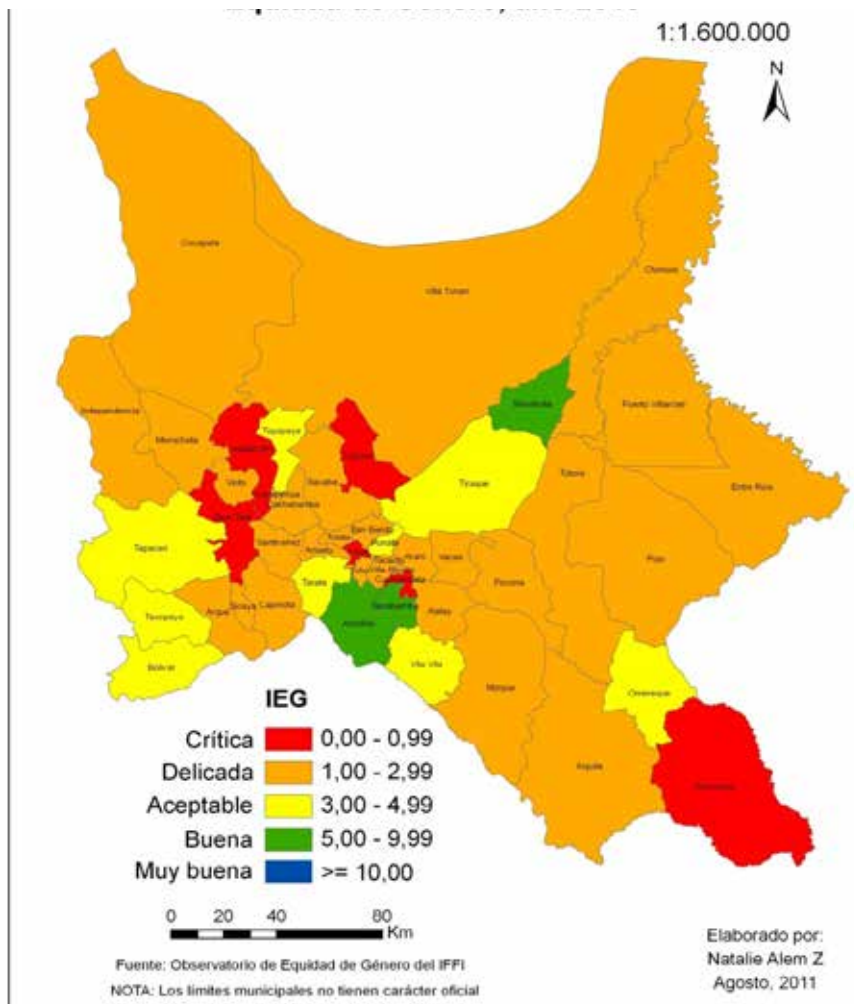
Thermometer for Gender Equality Performance

BLUE	Above 90% executed	Excellent
GREEN	Between 80 - 90% executed	Good
YELLOW	Between 70 - 80% executed	Acceptable
ORANGE	Between 60 - 70% executed	Weak
RED	Less than 60% executed	Critical

Likewise, after calculating the EIEG efficiency indicator, we assign each municipality's colors. Both thermometers provide us with elements to evaluate the progress made in gender and also build color maps that will give us a complete panorama of the current status of the municipalities in the country.

Below is a geo-referenced map of the municipalities of the Department of Cochabamba based on the budgetary implementation information collected by the Feminine Institute of Integral Training (IFFI) for its 2010 Gender Observatory.

Municipal Ranking on the Investment in Gender Equity in 2010



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