



GENDER RESPONSIVE BUDGETING

Textbook

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Chisinau, 2016

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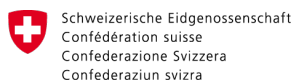
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The Academy of Economic Studies of Moldova (ASEM) is an independent higher education institution that integrates higher economic education with scientific research and ensures vertical integration of different levels of education – undergraduate, graduate and postgraduate. ASEM focuses on the specialized training for students, as well as on educating a new mentality in the spirit of freedom of thought and action, pragmatism and life efficiency.

For more information, please see www.ase.md



The United Nations Entity for Gender Equality and the Empowerment of Women (UN Women) is a world leader in promoting gender equality and the rights of women and girls. UN Women has three main areas of activity in Moldova: promotion of women in politics and decision-making processes, women's economic empowerment, elimination of violence against women and girls.

For more information, please see:
www.unwomen.org and
<http://moldova.unwomen.org>

This publication is the second edition of the textbook “Gender Responsive Budgeting” for Cycle II (Master) studies. The initiative of reprinting the textbook and the introduction of the course on Gender Responsive Budgeting (GRB) at the Academy of Economic Studies of Moldova (ASEM) was possible due to the conceptual support of the United Nations Entity for Gender Equality and the Empowerment of Women (UN Women), under the cooperation agreement between UN Women and ASEM. This cooperation takes place within the UN Women Regional Project “Promoting Gender Responsive Policies in South East Europe, phase II”, implemented in Moldova with the financial support of the Austrian Development Cooperation (ADC).

The regional project “Promoting Gender Responsive Policies in South East Europe, phase II” is implemented by UN Women in Albania, Bosnia and Herzegovina, the former Yugoslav Republic of Macedonia and Moldova, with the financial support of Austrian Development Cooperation and the Swiss Agency for Development and Cooperation. The project contributes to the implementation of national and international commitments on gender equality by integrating GRB in national and local planning and budgeting systems, building the capacity of central and local authorities in using the gender responsive budgeting tools in planning and budgeting, as well as building the capacity of non-governmental actors to hold governments accountable on the gender equality commitments, using GRB as a main tool.

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FOREWORD

Worldwide, over the past decade, more than 60 initiatives on integration of gender responsive budgeting were launched and their number is still growing. Efforts to integrate gender responsive budgeting in government policies gained importance, largely due to the Declaration on the implementation of gender mainstreaming drafted at the UN World Conference on Women, held in Beijing in 1995.

Once the gender mainstreaming becomes a strategy on a government's agenda, it is integrated into the macroeconomic policy, which is largely achieved through the public budget. Governments use public finances to influence the national economy and the macroeconomic development as a whole. At the same time, the budget is a political tool for the redistribution of national income, as the Parliament, as a legislative body, defines every year the taxes, charges and other revenues collected from individuals and businesses, and establishes the adequate distribution of resources by purpose. Reforms and programmes adopted through the budget law affect the formation and allocation of public funds for a longer period. At the same time, policies implemented through the public budget have significant implications for the everyday life of women and men, girls and boys. Thus, budgets translate government policy priorities and commitments at local, regional and national levels into practical actions.

Gender responsive budgeting (GRB) means gender mainstreaming in the budget process, which involves regular assessment and analysis of the budget impact on women and men, corroborated by the analysis and adjustment of relevant policies to reduce gender disparities. This type of budgeting promotes greater accountability on the performance of governments in using public resources by purpose in correlation with the needs of beneficiaries, women and men, girls and boys, and applies the gender mainstreaming in all public policies in accordance with international treaties and national development strategies.

The initiative on implementation of gender responsive budgeting in Moldova was launched with the support of UNIFEM and the Swedish Agency for International Development (SIDA) under the Programme on promoting gender equality in national policies and national development programmes in Moldova, with initial contribution from the regional (CIS CEE) programme on promoting gender equality and democratic governance by increasing transparency and accountability". In 2009, this initiative continued through the UNIFEM project "Introduction of the GRB course at the Academy of Economic Studies of Moldova (ASEM)". In 2013, UN Women launched a three-year Regional Project on Promoting Gender Responsive Policies in South Eastern Europe, Phase II, financed by the Austrian Development Cooperation (ADC) and the Swiss Agency for Development and Cooperation (SDC). The second phase of the regional project (2013-2016) aims at the implementation of commitments on gender equality in four countries, including Moldova.

The 2010-2015 National Programme on Ensuring Gender Equality (PNAEG, Government Decision no. 933 of 31 December 2009) covers eight priority areas that were identified as a result of analysis of priority sectors and key issues related to gender equality and women's rights. These priority areas are: employment and migration, social protection and family, healthcare, education, violence and human trafficking, public awareness, participation in political and public decision making on GRB. PNAEG supported the efforts to integrate gender responsive budgeting and was deemed to be a definite way to reform the public budget and retarget budget expenditures to the financing of economic and social problems, taking into account the interests of citizens, men and women, and to eliminate discrepancies between the promoted policies and how public resources are spent in different areas and for different groups of people. Thus, from the perspective of potential benefits, GRB is an effective tool, which guarantees the principle of gender equality in the allocation and redistribution of public funds.

A key aspect of gender responsive budgeting is to build and strengthen institutional and individual capacities of central and local public authorities, academia and civil society. While applied in educational institutions, the effort is perceived through the long-term added value for stakeholders, beneficiaries and society as a whole, contributing to the formation of generations in the spirit of assimilation, promotion and achievement of gender equality. In this context, UN Women in Moldova is interested to further develop the ASEM's capacity, which will strengthen the promotion of gender equality and implementation of GRB in the short, medium and long term. Through the successful integration of the course "Gender responsive budgeting" in the academic curriculum, ASEM ensures the training of a group of experts on GRB and the development of skills and knowledge of existing and potential experts on the GRB concept and tools.

Introduction of the subject "Gender responsive budgeting" in the Cycle II (Master) at the Academy of Economic Studies of Moldova is a key, comprehensive and competitive stage in achieving sustainable development goals in close cooperation with the Moldovan public authorities. Institutional capacity building efforts can and should be supported through an accredited higher education institution with remarkable scientific, methodical and teaching potential like the Academy of Economic Studies of Moldova. ASEM is among the first higher education institutions in the CIS countries, which included the subject "Gender responsive budgeting" in the university curriculum in Cycle II (Master), the Master programmes in "Public Finance and Taxation" and "Accounting and Audit in Public Institutions" as a mandatory course.

Currently, the Academy has a group of qualified professors who underwent several stages of training on GRB with the support of UN Women: Angela Casian, Associate Professor, Doctor of Economic Sciences (an expert in gender analysis); Andrei Petroia, Associate Professor, Doctor of Economic Sciences (an expert in gender mainstreaming in the budget process); notable researchers in such research areas as: social policy and gender - Dorin Vaculovschi, Associate Professor, Doctor of Economic Sciences (an expert in sociological gender aspects); Valeriu Sainsus, Associate Professor, Doctor of Economic Sciences (an expert in gender demographics); gender inequality

indicators - Ion Partachi, Professor, Doctor of Economic Sciences (an expert in gender statistics); micro- and macro-budgeting issues - Anjela Baurciulu, Associate Professor, Doctor of Economic Sciences (an expert in gender mainstreaming).

At the same time, ASEM has the opportunity to invite practitioners, both from the central public authorities such as the Ministry of Finance and the Ministry of Labour, Family, and Social Protection in order to provide necessary support in promoting the GRB concept at the institutional level. Thus, this paper provides a comprehensive knowledge base for building a sustainable system of training of junior and experienced civil servants, involved in planning and budgeting activities.

This textbook, which is the second (revised and supplemented) edition, was developed in order to present and explain from the methodological perspective the concept of gender mainstreaming and gender responsive budgeting and is designed to all those interested in mainstreaming gender in their activities to ensure gender equity through their actions and to make the best use of resources in order to obtain results that benefit equally, women and men.

The materials in this paper can serve as a bibliographical support in the teaching process in higher education institutions and can be used in the public institutions involved in promoting gender mainstreaming in the budget process. In this context, the textbook can be used while studying various aspects of public finance, public sector financial management, local public financial management, budgeting methods and techniques, development of strategies and public policies etc.

The authors

ACRONYMS

| | |
|-----------------|--|
| CEDAW | Convention on the Elimination of All Forms of Discrimination against Women |
| CPA | Central Public Administration |
| GDI | Gender Development Index |
| GDP | Gross Domestic Product |
| GEI | Gender Equity Index |
| GPI | Gender Poverty Index |
| GRB | Gender Responsive Budget |
| GSA | Gender Self-Assessment |
| HBS | Household Budget Survey |
| HDI | Human Development Index |
| HH | Household |
| HHB | HHB Household budgets |
| IPPF | International Planned Parenthood Federation |
| IWDA | International Women's Development Agency |
| LB | Local budget |
| LPA | Local Public Administration |
| MDGs | Millennium Development Goals |
| MF | Ministry of Finance |
| MH | Ministry of Health |
| MHIF | Mandatory Health Insurance Funds |
| MLSPF | Ministry of Labour, Social Protection and Family |
| MTBF | Medium Term Budget Framework |
| NBS | National Bureau of Statistics |
| NDS | National Development Strategy |
| NGOs | Non-Governmental Organizations |
| NHIC | National Health Insurance Company |
| NSIA | National Social Insurance Agency |
| OECD | Organisation for Economic Co-operation and Development |
| PBB | Performance Based Budgeting |
| PPAs | Participatory Poverty Assessments |
| SB | State budget |
| SDGs | Sustainable Development Goals |
| SSIB | State Social Insurance Budget |
| UN | United Nations |
| UN Women | United Nations Entity for Gender Equality and the Empowerment of Women |
| UNDESA | United Nations Department of Economic and Social Affairs |
| UNDP | United Nations Development Programme |
| WBI | World Bank Institute |
| WPI | Women's Participation Index |



Topic 1. CONCEPTUAL AND THEORETICAL ASPECTS OF GENDER

Keywords: *sex, gender, gender relations, gender stereotypes, sexism, gender discrimination, gender equality, feminism, gender studies.*

1.1 Gender. General concepts

The term **gender** has emerged recently and was borrowed from linguistics¹ to explain and understand social, economic and cultural relationships between women and men. Gender is a symbolic system used to interpret relations between people. Whereas sex refers to the biological differences between women and men, gender refers to the way a specific culture defines these differences, as well as differences between women's and men's lifestyles and the way in which individuals see their and others' lives in terms of male-female relationship.

Researchers identified the relativity of “typically male” and “typically female” representations. An occupation or behaviour perceived as typically male in one society can be treated as typically female in another society. Thus, the biological sex does not account for differences in social roles of women and men in a society.

The term “gender” does not replace the term “sex”, which refers only to biological differences. Traditionally, **sex** is used to define anatomical and physiological peculiarities of people, which are used to divide them into men and women.

Sex (i.e. biological peculiarities) was perceived as the main factor of the differences between women and men. However, it is noted that, biologically, women and men have more similarities than differences. The single most important biological difference between men and women lies in their reproductive roles. Apart from biological differences, people are divided according to *social roles, types of activity, differences in behaviour, emotional characteristics, etc.*, which, in a society, are quite relative and do not correlate perfectly with “typically male” or “typically female” representations. Biological sex does not account for differences in social roles of women and men in a society.

¹. In linguistics, gender is a feature of nouns or adjectives that describes them as either feminine or as masculine, and, in some cases, as neutral. Obviously, in various countries, the significance of grammatical gender is different depending on the logic or the existing linguistic culture. In some languages (e.g. Hungarian, Finnish), gender is not available and does not make sense. In other languages (Latin languages), the neutral gender is extended to non-human beings and things.

Table 1.1.

The difference between sex and gender

| Sex | Gender |
|---|---|
| Is biologically determined | It is learned and it is not “natural” |
| Refers to physical, physiological and chromosomal characteristics | Behaviours, beliefs and attitudes assigned by the society |
| In most cases, a person is born with a determined sex, a male or a female | What is believed to be appropriate for men and women can change over time and depending on the sociocultural context |
| Cannot be changed (without external intervention) | Intersects with other social variables that also generate inequalities: social class, ethnicity, nationality, sexual orientation, migrant status, disability etc. |
| The same in all cultures and does not depend on social factors | Generates different identities, expectations and opportunities |
| | Creates power relations and inequalities between women and men |
| | Inequalities operate at several levels: micro (individual, family), meso (interpersonal), macro (institutional) |

Source: Allison J. Petrozziello. *Gender on the Move: Working on the migration-development nexus from a gender perspective. Training manual, Santo Domingo, UN Women, 2013.*

Currently, the term **“gender”** has a rather wide scope. In psychology, for example, **“gender”** is used broadly to refer to any psychological or behavioural traits associated with masculinity and femininity that, hypothetically, differentiate men from women. The term **“gender”** is also used in other contexts. It can also refer to various non-human phenomena. For example, in ancient Greece, odd numbers were considered masculine and even numbers – feminine. Cats are typically perceived as feminine creatures regardless of their sex. Certain occupations are deemed typically male or female occupations; *Rock* music is regarded as masculine, while *Latino* is feminine. In some surveys, nations are classified according to their degree of femininity/masculinity. Certain behaviours, activities, feelings can be also categorized by gender. For example, empathy or particularization are considered feminine traits, while analytical spirit and tendency towards violence and aggression are seen as masculine traits.

According to Judith Lorber, American sociologist: **“Gender is a human invention, like language, kinship, religion, and technology; like them, gender organizes human social life.”**² People are born of one sex and try to get inside the prescribed gender, and namely to better resemble the femininity or masculinity pattern of the society in which they live. They make, every time, express or implied efforts to comply with the prescribed gender. They behave, dress, talk, and move according to

² Lorber, Judith, 1994, *Paradoxes of Gender*, London: Yale University Press.

femininity/masculinity standards believed to be correct, appropriate, and normal at some stage.

The deviation from the prescribed gender norms is punished severely by the society, while social pressure to enforce them is very strong. For example, since masculinity is traditionally equivalent to a successful career, men's suicides occur, on average, more frequently because of a professional failure, while women's suicide is mostly due to unsuccessful family life or unrequited or failed love, since femininity is associated with a successful private life. People who have ambiguous gender/sex identities (gay, bisexual, pansexual, transvestite, transgender, transsexual, androgynous people) have various problems of social integration.

Sociology has long addressed the differences between men and women in terms of natural or biological differences, and not in terms of inequality. At the same time, these differences are transformed finally into **inequalities**. To highlight the social mechanisms through which certain biological differences between women and men turn into social, economic and cultural inequalities, the sociology uses the concept of **gender**.

As such, the term **“gender”** was first used by the American psychoanalyst Robert Stoller, who in 1958 proposed to use that concept to highlight the distinction between the biological and sociocultural nature of a person³. R. Stoller limited the concept of **“sex”** to biological characteristics and the term **“gender”** to a system of values, interpretations, representations, attitudes of individuals or society against women or men. The emergence of this new term, reflecting the nature of sociocultural differences between men and women, ended the classical tradition of socio-psychological analysis of the sexes, in which the main determinants were biological. In fact, the feminist movement, which has taken a new momentum in the 1970s, also contributed to this new interpretation of relations between women and men.

Gender is a dynamic concept with various forms. Each society determines its own rules of gender relations. These rules vary over time. Thus, femininity and masculinity, as historical and cultural concepts, are treated differently by society members and are always contextual. Gender patterns vary from one culture to another, from one historical period to another, between men and women of the same culture and throughout the life of each individual. Social factors, such as class, age, race, ethnicity, area of residence, etc., are constantly shaping behaviours, meanings, and ways of expressing gender of each individual.

Anthropological studies revealed a multitude of gender patterns, demonstrating that gender has different meanings in different cultures. Thus, the anthropologist Margaret Mead, focusing on the study of primitive societies, demonstrated that there are cultures that encourage an extremely tough masculinity, based on violence and aggression, while others encourage a moderate masculinity, based on empathy and participation in community life.⁴

History also brings proofs of changing meanings of gender and gender relations. The current meaning of observing the femininity or masculinity canons differs from

³. https://fr.wikipedia.org/wiki/Genre_%28sciences_sociales%29

⁴. Mead, Margaret, Sex and temperament in three primitive societies, New York: Morrow, 1935.

meanings used centuries ago. Currently, European societies no longer expect, for example, girls to be virgins at marriage, while several hundred years ago they were wearing chastity belts to protect their virginity. Family relationships between men and women also have changed over time. If, in ancient Rome, the purpose of marriage was only procreation, while love was associated rather with extramarital relations, currently, there are family patterns in which men take their parental leave to raise children.

Fashion also offers arguments related to the dynamic and evolving nature of the gender. Every age has a fashion fit to the current mentality and image about gender. From feminine corsets, to short skirts and casual pants, women went a long way of “liberation”, not only in terms of clothing. There are similarities and a whole history of the evolution of mentalities about the cultural norms of gender between the effeminate and powdered medieval man with wigs and the contemporary man shaping his muscles in the gyms and dressing in a more sophisticated way at a limit between feminine and masculine.

Gender refers not so much to women or men, but to **relations** between them and the way they build these relationships or, in other words, how society creates such relations. Thus, from a gender perspective, it analyses the contents of traditions, religion, morals, political institutions, economy, culture – the content of any human activity and social organization activity.

In other words, gender is “***the totality of social and cultural norms that should be observed by people based on their biological sex. These norms determine the psychological qualities, behavioural model, fields of activity, women’s and men’s professions***”.

Gender as a **social construct** is an idea developed by people, groups and institutions that make up society. Gender differences are not neutral, as they are often built in opposition to each other (e.g., ideas that men are strong and women have less force), thus creating **power relations** that reside in inequalities between men and women.

These relations can change over time and vary by socio-cultural context. Gender also interferes with other dynamics of identity and power, such as social class, ethnicity, nationality, sexual orientation, employment or economic status etc.

1.2 Gender roles and stereotypes

Gender refers to the social differences between men and women that are learned and that change over time. A baby is born of one sex and, through specific mechanisms, learns its “gender” according to the ideas and prejudices prevailing in the society, in which it was born. Thus, under the influence of each social institution and through the process of gender socialization, the child cultivates for itself appropriate gender norms; it acquires a gender conscience. What he/she sees, hears and experiences in the family, the toys he/she gets, the stories that are read to her/him, the movies that he/she watches on television, what he/she is told in school or in church, all of these contribute to the shaping and assuming of a cer-

tain model of masculinity-femininity through various specific social mechanisms. Adults tell to boys: “Do not cry, you’re not a girl” and to girls “Do not climb trees, you’re not a boy.” Thus, the subconscious mind of children grasps the idea of the strengths of their own sex and the shortcomings of the opposite sex.

Being male or female means not only being equipped with some or other anatomical features, but also the realization of one or another of the **gender roles**. Gender roles are one of the forms of expressing social roles, a set of rules of behaviour for women and men. Biological sex cannot explain the differences between the social roles of women and men in society.

Gender is determined by the society, as a way of being for women and men. Gender determines the role and status in society and within social institutions such as family, labour market, political activity, education, culture, etc. The forms of expressing gender (behaviour, values, occupations, forms of social interaction, depending on gender) vary depending on the country, culture and society. However, it is noted that in any society, gender relations are asymmetrical. Man and all that is “manly” is considered to be more important, being dominant over the “womanly”, which is considered to be secondary, inferior, unimportant in the social hierarchy. The “*manly*” is identified with God, creativity, power, activism, rationality etc. Accordingly, God, creativity, power, etc. symbolizes *masculinity*. The “*womanly*” is associated with the opposite phenomena and concepts such as nature, weakness, subordination, passivity, chaos, etc., which, in turn, symbolizes *femininity*. Dividing the world according to concept of “male” and “female” leads to building of social structures in society, in which women occupy an inferior position to men. While currently considerable efforts are made to ensure certain equality in gender relations, they continue to be asymmetrical.

Gender relations are an important determinant in the process of social stratification of the society. Along with other socio-demographic characteristics, such as race, nationality, class, gender contributes to the formation of such social hierarchies in the society, whereby women usually occupy a social position inferior to that of men, play less important social roles than those of men. An important factor in establishing these relationships is the mentality, the dominant value system of the people, which are formed and developed through promotion of socio-cultural stereotypes by use of social institutions. From the moment of birth, the person starts to be influenced by the system of gender relations. The family, the school, the church, the community, the society in general, cultivates and develops children through the process of education and socialization, through different gender norms, rules of conduct, which should correspond to a “true man” or a “true woman”; however, these are just **gender stereotypes**.

Thus, the fact that boys must wear blue clothes, while the girls – pink ones, the boys should play with toy cars, and girls – with dolls, the boys should practice more sporty games and girls, respectively, less sporty ones etc., are convincing examples of cultivating *gender stereotypes* in children. The roles, norms, values, character traits are imposed by society to women and men through socialization tools, social division of labour, cultural values, thus establishing a hierarchy in power relations and, respectively, a traditional gender asymmetry.

Therefore, gender is quite a complex and difficult sociocultural process for shaping

behaviour in mental and emotional characteristics of women and men. The main elements in the process of shaping gender differences are the opposition between “the manly” and “the womanly”, as well as the subordination of the female content to the male one.

Accepted norms and stereotypes in society largely determine the psychological qualities, areas of activity, and professions of people according to their biological sex. At the same time, gender roles and stereotypes are not of a universal nature and vary from one society to another. In everyday life, specifically by social norms, the society establishes the image of a “true woman” and of a “true man”. Every society, through these social norms and stereotypes, prescribes what is allowed and what is prohibited in the behaviour of women and men. Actions and feelings of men and women are largely determined by the approval or sanction of society. Thus, if a woman gets married late in life or does not marry at all and has no children, while dedicating her life to career, she is blamed and considered flawed, being associated with frustration. Conversely, late marriages and focus on career are perceived as a natural thing for men. In addition, housework is believed to be shameful for a “true man”, as it is considered to be “purely female” and unimportant. Indeed, a “true man” should pursue activities that are appreciated in society, which are believed to be manly and only occasionally he can help the woman in domestic (“female”) activity.

In gender psychology, there are three kinds of psychological behaviour: masculine, feminine, androgynous.

Masculine (male) behaviour is characterized by aggressiveness, persistence, initiative, directed towards authority and leadership, career and success, the ability to act decisively and to undertake risks.

Feminine behaviour is notable by passivity, empathy, subordination, patience, it being highly adaptive.

Androgynous behaviour is expressed by combining the qualities of the two types of behaviour.

These three modes of behaviour do not depend directly on the sex of the person. Although masculine behaviour is prevalent in men, and feminine - in women, they may be encountered also in the opposite sex, while androgynous behaviour is found in both women and men.

People who develop androgynous behaviour often achieve success in business. In a family, in which at least one representative has female behaviour, whether male or female, the psychological climate is more stable. Currently a trend is emerging for women’s masculinization: increased authority, aggressiveness etc., which certainly leads to feminization of men. This unconscious feminization of little boys and masculinization of girls is observed both in the family and in kindergartens and in schools and it is determined, largely, by the visible effects of technological progress which shows a rather strong influence on changing labour content, on social modernization in general, on changing social relations between members of society, regardless of their sex.

In recent years, several studies were initiated, which were focused on changing

gender stereotypes. However, they still failed to formulate responses to questions related to mechanisms of shaping the behaviour of women and men in gender relations, which are the factors that contribute to establishment of gender stereotypes in society, how they determine the new social structure, how they shape a new gender culture. These studies were focused, primarily, on emphasizing gender inequalities generated by power relations between women and men in contemporary society.

In most societies, gender identities are not only believed to be different, but are evaluated differently. Gender differentiation emerges both at the level of the individual (each individual operates with a set of stereotypes and prejudices in defining the masculine and the feminine) and at the structural level (any society prescribes behaviours and ways of social interaction for its members based on sex). This *pattern*, as institutionalized by gender differentiation, has an essential impact on the lives of women and men. Thus, gender expresses the universal (but not uniform) differences and inequalities between men and women or among men and among women.

When we analyse gender from sociological point of view, we mean ***hierarchy, power, inequality***, and not just differences; we are concerned, among other things, with gender stereotypes underlying prejudices and gender discrimination (sexism).

Sexism is behaviour, rules, practices, policies, language, norms, laws that presumes unequal treatment, unfavourable to an individual or a group, due to its belonging to a certain ***sex / gender***. Although both women and men can be victims of sexism, the term refers especially to women, which are mostly subject to such discrimination.

Sexism against women, with the general meaning of hatred for women is called ***misogyny*** (most misogynists are men, but there are also misogynist women).

Sexism against men, in the sense of hatred of men is called misandry (most misandrists are women, but there are also misandrist men).

Inequality, which occurs as a result of gender relations, leads to the phenomenon of gender discrimination. In general, there are two types of gender discrimination:

Direct discrimination: less favourable treatment of a person of a certain sex / gender on grounds of belonging to that sex compared to treatment of a person of the other sex / gender in similar situations and contexts (unequal salaries for the same type of activity; sexual harassment etc.). Direct discrimination is a visible form of discrimination, most often easily identified and documented.

Indirect discrimination: application of provisions, criteria or practices, which are apparently neutral, but which, through the effects they generate, are affecting the people of a certain sex; this subtle form of discrimination can be overlooked and it is harder to document; it is sometimes considered natural (e.g. some normative physical characteristics, e.g., height or weight required for admission to military schools or the police, which, from the very start, disadvantages women candidates).

Today, there is much talk about ***multiple discrimination*** that may manifest itself in many forms - ***uniaxial*** (different features of people lead to different and unfair treatment), ***additional discrimination*** (joining of two or more types of discrimina-

tion based on various criteria), **cross-sectional discrimination** (which is not joining of two or more sources of discrimination but is the result of a synergy of both)⁵.

We can also talk about **structural gender discrimination**, which implies low representation of women or men in different areas (for example, the modest share of women in parliament). If the first two forms of discrimination can be sanctioned, highlighting structural discrimination through statistical methods has the specific role to stimulate and justify the need to develop specific measures to reduce gender imbalances in the respective areas.

In order to decrease gender discrimination, there are countries that promote a policy of **positive gender discrimination**, i.e. treatment, rules, laws, policies favouring women because they are women and therefore are discriminated against. This includes, for example, enhancing the number of women among decision-makers by allocation of a specific number of seats for women in Parliament. Gender discrimination is a subject of important national and international documents. Thus, the perspective of gender equality, combating discrimination and empowerment of women is essential in promoting public policies in all countries. This condition is reflected in both the Convention on the Elimination of All Forms of Discrimination against Women (CEDAW), which was launched on 18 December 1979 (ratified by the Republic of Moldova on 28 April 1994) and in the national legal framework, such as: Law No. 5-XVI of 9 February 2006 on Ensuring Equality between Women and Men; the National Programme on Ensuring Gender Equality 2010-2015⁶.

Additionally, on 20 November 2013 the Gender Equality Strategy was approved by the Council of Europe for the years 2014-2017, which has the following objectives: combating gender stereotypes and sexism; preventing and combating violence against women; ensuring equal access to justice for women; achieving a balanced participation of women and men in decision-making positions in public and political life; gender mainstreaming in all policies and activities. Although many efforts were made in this area, progress is still slow.

Therefore, we can conclude that gender is a hierarchical system that creates inequalities, which affect all aspects of social life. Gender does not refer only to women, but to power relations between women and men.

Gender is also a problem of men! Masculinity (ideas about “how a man should be”) is a social construct (like the ideas about femininity), which has both advantages and disadvantages. Gender transcends other axes of social hierarchy - ethnic origin, social status, sexual orientation, etc., to produce various groups of women and men.

1.3. Sociological theories about gender

The scientific interest for gender analysis and study of gender relations is relatively recent. Only in the seventies, which marked an important change in researching

⁵. Lazăr Vlăsceanu (coord.) Manual de sociologie, Capitolul „Gen și societate” de Laura Grunberg, B. Polirom, 2010.

⁶. Government Decision No. 933 of 31 December 2009 on Approval of the National Programme on Ensuring Gender Equality for 2010-2015.

gender relations, so-called **“gender studies”** began to develop as an interdisciplinary field, in which gender is studied seriously at the border of several disciplines such as psychology, history, sociology, anthropology, philosophy. Specifically over this period, the feminist movement of scale has systematically criticized the sociology, calling it “blind to gender”, saturated with gender prejudices and gender stereotypes; thus the feminist movement contributed to the development of research in the area of gender relations, issues related to the social status, social roles, social activities of women and men, which led to the creation of an independent research area, **“gender sociology”**.

It may be noted that for a long time sociological research focused on gender relations was ignored. The “sex” variable was generally omitted from research, women not being a subject of study. Prior to the eighteenth century it was generally believed that there was only one sex and that society was composed entirely of men (and, mostly, white) while the internal genital organs of women constituted the reverse of those of men, the body of men being considered as a superior version of the female body.

Thus, often it was considered normal to carry out studies on samples of men, but to draw conclusions about people in general. Interest in research was predominantly focused on the male-dominated public sphere and it was believed that social structures and institutions were gender-neutral and thus, that it made no sense to have special concern about genders. Researchers of that time believed that the life experience of men could be attributed equally to women, ignoring inequality and discrimination against women, which occurred due to differences in social activities, vocational training, education etc. Social behaviour and experience of women were hardly studied at all. The research was mainly focused on the problems of men, their occupations within industrial enterprises, crime etc. In describing their roles and social status, only remunerated activities were taken into account (without taking into consideration housework practiced usually by women). The classical study of Weber on bureaucracy can be an example of such “gender blind” research⁷.

The research focused on gender was carried out, most often, within family sociology. For other areas, gender was not given importance. In research, the focus was on gender differences and not on gender inequalities or understanding of complex mechanisms by which these differences produce social stratification and discrimination. Even if women were included in the analysis, they were treated by certain masculine standards, while the characteristics, behaviours identified for men were taken as the benchmark. However, research dedicated to differences between men and women can be found from the most ancient times.

1.3.1 Traditional theories regarding the role of women and men in society

Throughout the evolution of society several philosophical, psychological, social theories were developed, their message being that differences between men and women were of a biological nature, while social roles of men and women were diametrically opposed. While the masculine was associated with reason, the feminine was associated, respectively, with chaos, with nature.

⁷ Weber, Max. *Etica protestantă și spiritul capitalismului*, București: Editura Humanitas, 1993.

Thus, in ancient Greece, the ability of the woman to bear children was associated with fertility of nature. However, the maleness was associated with wisdom of rational gods, who provided a logic in development and in the social order. Specifically, in ancient times there was a shift from the archaic fertility cult to worship of the rational gods and legitimacy of domination of men over women. In the Greek philosophy, the manliness was associated with rationality while the womanly – with the emotional. In the 6th century BC, the Pythagoreans, while developing a table of the main contrasts to explain the laws of development of the world (the table comprises ten pairs of contrasts, such as even and odd, right and left, light and dark, male and female, good and bad etc.) in one of these contrasts, a component is higher than its opposite pair.

The masculine was considered to be an active, determined form, while the feminine – a chaotic and passive activity. Distinctions between the ideal and the material appear in the works of Plato, the ancient Greek philosopher (427 BC - 347 BC), who imposed this distinction between the soul and the corporeal, rationality and emotionality, respectively, “the manly” and “the womanly”, which become dominant later in the Western philosophy. Similar interpretations are characteristic to Aristotle (384 BC - 322 BC), who identified knowledge and rationality with the active manly essence and the chaotic matter as an inferior substance – with the passive womanly essence. Also, according to Philo, the philosopher of Alexandria (25 BC - 40 CE), “the manly” represented everything that is rational, conscious, divine, while “the womanly” represented the dirty bodily world, as opposed to reason. Based on this logic of ideas, the progress of civilization would consist of repressing “the womanly” and domination of “the manly”. In the same context the “witch hunt” of the Middle Ages can be explained, which had cost the lives of thousands of women, who were considered less loyal and more influenced by evil forces (the etymology of **“Femina”** comes from the Latin “fides” - faith and “minus” - less).

In the Renaissance, the suppression of the natural, thus, of the “womanly” becomes a systematized principle. Francis Bacon, an English philosopher of the 17th century (1561-1626), argues that the rational is an instrument of measurement, study and domination over nature, while nature is analysed as similar to a tool and not a body, as did the ancient philosophers. In this concept, one of the tasks of science was to find the most effective ways of domination over nature. In philosophical ideas promoted by Bacon, nature is “*she*” while reason, knowledge, science is “*he*”. Thus, Bacon proposed recognition of the relationship between knowledge and nature, in which the role of man is the subject of knowledge, whereby man assess his power and dominates over nature (woman).

The study of relations between men and women, their role and place in society is not a new theme for modern science. In the 17th – 18th centuries, believed to be a century of Enlightenment and of the Industrial Revolution, the trend for repression of the “womanly” (the natural) by the “manly” (rational) was maintained. During this period, it was assumed that there were significant biological differences between men and women. Men, who were prevailing at the time in intellectual, research, economic and public activities, have contributed to the establishment of a “manly” societal model, which was passed to their successors, who were also men. The concept was that men were rational beings by nature; that they were wise and able to create a new culture and to control nature. It was said that a man, by essence, was a leader, an active,

aggressive, authoritarian person, and, by definition, he was superior to the woman.

On the other hand, women were believed to be limited by nature. Based on their ability to bear children, they were allocated the right, at least in Western cultures, to be responsible for raising children and caring for them. Women were perceived as fragile, impulsive, passive and dependent beings.

Given the fact that the industrial revolution has dramatically changed the relations of production and the family relations that existed in pre-industrial times, the new division of labour has led to the division of activity and influence areas specific for men and women. Thus, men were primarily associated with remunerated work, various social responsibilities, public activities, while women's activities were concentrated mainly in private areas related to family and domestic work.

Biograms of men and women, although having some similarities, were different due to the fact that they contained features from prehistoric times: of “hunters and gatherers” for men and “caretakers of the house” and other housework for women. It was this specific legacy that determined men to be more aggressive, more violent, and women to show affection to their children and to bear responsibility for their well-being and prosperity.

Immanuel Kant (1724-1804), founder of the German classical philosophy, was at the time supporting the idea that women have inferior intellectual capacities as compared to men. He argued that insufficient abstract thinking makes for the development of sensuality and the practical spirit, the sense of beauty in women. In family life, which plays the role of main link of society, man and woman mutually compensate their shortcomings and thus ensure the harmonious life, in which “the womanly” and “the manly” complement each other. However, in family relationships, women have a lower, incomplete status, secondary to that of men.

However, the German philosopher Georg Wilhelm Friedrich Hegel (1770-1831) believed that family relationships were inferior to the relationships in society, the former being relationships between relatives, by blood, and not between citizens. The family was a lower world. Thus, since women were not citizens, the family was a world of women. Starting in the 18th-19th centuries, the first theoretical approaches of gender relations emerged, which advocated the idea that equality between women and men in society must be a social norm. These ideas emerged due to the development of the liberal philosophy, the emergence of socialist ideas and the wave of bourgeois democratic revolutions in Europe. Karl Marx (1818-1883), being under the strong influence of the works of utopian socialism, advocated for the idea of women's emancipation, but did not pay special attention to it. However, Friedrich Engels (1820-1895) explained the emergence and existence of discrimination against women by men through the fact of concentrating property in the hands of the latter. It was obvious that the relations of power and property were determined not only by class, but also by gender. Marx and Engels, in their research, were pretty close to the essence of gender stratification, but they did not examine it in a sufficient manner.

1.3.2. Modern sociological theories about gender

The nineteenth century is considered to be the century in which the main modern sciences were established, including sociology, i.e. the science that explains the

essence of social relations, including those between men and women, gender differences and inequalities. Amid the development of sociological research focused on gender relations and differences, several trends and several approaches may be highlighted. Thus, we may distinguish directions of thought and research that emphasize: a) nature, as the decisive factor in determining gender identity (sociobiologists, psychoanalysts, positivists); b) the cultural factor as being decisive in shaping gender identity (representatives of social learning theories, functionalists, conflictualists or those who favoured micro-social approaches, such as ethnomethodologists); and c) the negotiation between the two distinctly different positions (constructivists, followers of biosocial perspectives)⁸. Sociologists have long believed that men and women were different and unequal in their physical, intellectual, emotional or moral abilities from birth.

Thus, the advocates of **biological determinism** (sociobiologists) or of evolutionary theories claim primacy of nature over culture, often rather using comparisons with the animal world behaviours than data from anthropological research or history. Hormones, chromosomes, brain size, genetics are, in their view, responsible for the behavioural differences between men and women. The man, the society are products of evolution, of the process of selection, while social hierarchies, including gender roles, are justified by biological laws of nature. Thus, women are genetically equipped not only to bear children but also to take care of them, while men are prone to violence due to their hormone structure (testosterone). These differences would appear in almost all societies, which, they say, is an argument in favour of the statement that natural factors as the ones responsible for the differences and inequalities between women and men.

The sociobiologists, while developing Darwin's evolutionary theory, argue that natural selection is shaping not only the physical, but also the behavioural characteristics of people. Depending on their biological sex, people choose the best way to increase their chances of survival and reproduction of the human species. Thus, E. O. Wilson⁹ argues that the distinct social roles of women and men are determined by distinct behaviours in their reproductive process. For example, men are more likely to be frivolous in their relations with women, because they produce millions of spermatozoa, while women are more temperate, because they produce only one egg per cycle. Wilson notes: "People of male sex are interested in being more aggressive, more frivolous, while for women it is more convenient to be more temperate until they find the right man. These sexual behaviours are justified by the instincts of women and men to continue their species"¹⁰.

The psychoanalytical school adheres to the same deterministic logic for explaining gender differences, the school influencing the sociological research of the time. Focusing on "*sexuality*" or "*libido*" as determinants of human behaviour, Sigmund Freud believes, for example, that there are major differences between the sexes and that they are inevitable and natural. For Freud, masculinity is associated with activity and femininity with passivity, jealousy and narcissism¹¹. As an extension of

⁸. Lazăr Vlăsceanu (coord.) Manual de Sociologie, Capitolul "Gen și societate" de Laura Grunberg, B., Polirom, 2010.

⁹. E. O. Wilson, *Sociobiology: The New Synthesis*, 1975.

¹⁰. Джейн А. Томпсон, Джудит Пристли, Социология: Вводный курс, Львов: «Инициатива», 1998.

¹¹. Freud, Sigmund, 1995, Vina de a fi femeie. Noi prelegeri de introducere în psihanaliză, București: Editura Mediarex, pp. 156-157.

the ideas of Freud, Carl Gustav Jung, founder of the analytical psychology, speaks about the “*anima*” - depository of female characteristics in the subconscious mind of the male versus “*animus*” - the depository of male characteristics in the female subconscious mind¹².

Emile Durkheim also accepts the primacy of nature over culture in gender differences. In this regard, he believes that since women live longer than men outside society, they are endowed with less sociability and are less influenced by it. Society is less necessary to women as compared to men who are more complex social beings and can keep their balance only in social life. The men are much more actively involved, their level of socialization being much higher than that of women. Man's tastes, aspirations, humour, are mostly of collective origin. Thus, the man has completely different needs than the woman. If the man can be considered a product of society, the woman is a product of nature¹³.

Biological arguments had strongly influenced the attitude towards gender differences and inequalities in the social life. However, these differences do not produce automatically economic, political and social inequalities between men and women, which is observed in contemporary society. Biological differences are only a precondition, which is transformed in gender inequality due to complex social mechanisms.

Biological determinants play an important role in shaping gender identity of people. However, the **cultural factors** are decisive in building them. This would be the main thesis of the advocates of **social learning theories**. These theories support the idea that gender is learned and the origin of gender differences and, implicitly, of gender inequality, is in the process of gender socialization, learning of gender roles with the help of important social institutions such as family, school, church, media etc.¹⁴. A baby is born of a certain sex and, through specific mechanisms, learns its gender according to the ideas and prejudices prevailing in the society in which it lives. What it sees, hears in the family, the toys it gets, the stories read to it, the movies it watches on television, what it is told in school, all these contribute to shaping of a certain gender model through various specific socialization mechanisms.

Functionalism, which was constituted in the first half of the twentieth century, has interpreted gender in terms of gender roles. According to functionalists (Talcot Parsons, Robert Merton)¹⁵, the social balance is determined, largely, by the different roles of women and men, which are considered to be natural. For a family to function harmoniously, the adults should specialize in some particular roles that are learned through socialization.

The functionalist perspective on gender is similar to that of socio-biology with the exception that it does not require that gender inequality must necessarily exist.

Recognizing the role of social learning provides an explanation of the origin of gender differences, but it also raises some questions. By considering that gender dif-

¹² Jung, Carl Gustav, *Arhetipuri și inconștientul colectiv*, București: Editura Trei, 2004.

¹³ Durkheim, Emile, *Despre sinucidere*, Iași: Editura Institutul European, 1993.

¹⁴ Piaget, J., *Construirea realului la copil*, București: Editura Didactică și Pedagogică, 1972.

¹⁵ Talcot Parsons, *The Social System*, London: Tavistock, 1951. Robert Merton, *Social Theory and Social Structure*, New York: The Free Press. 1968.

ferences as natural, gender inequalities are justified. The concept of role puts, in general, more focus on the individual than on social structures, involving the complementarity of roles, thus ignoring the problems of conflict and power. On the other hand, socialization (including the gender one) does not occur in a vacuum; it is a process by which people adjust to a structured environment and to gender inequalities. The socialization theory explains the origin of gender inequality. However, it cannot explain how inequality arises. Emphasis should be placed on gender stratification, and not on gender socialization, the priority being the need for social change.

While **positivists** believe that societies are functional, but class, race, gender are most frequently dependent variables, that can be explained in terms of roles and expectations, in case of **conflictualists** the societies are dynamic, while gender in this context is analysed in terms of *power relations*, not *gender roles*. The Marxist doctrine, for example, believes that race and gender are the means by which some people are subject to discrimination and are oppressed, while the family is the place where they reproduce bourgeois-proletarian relations. Consequently, the origin of gender stratification must be sought in the institutions of capitalism that benefits from subordination of women. The men that became strong in pre-industrial times, highly valued due to physical force, were exempted from responsibilities of child rearing. Women, like proletarians, have access to resources only through men. In developing these ideas, Engels analysed the link between women's subjugation and emergence of capitalist private property during the industrialization period¹⁶.

Non-Marxist conflictualist theories accept that relations between men and women cannot be addressed solely by differences in sex or economic differences, widening the scope of investigation of the theme of social conflict by including aspects related to age, ethnicity, religion, and profession.

While positivists and conflictualists address gender from the institutional, macro-sociological perspective, the **interactionist** sociology, in which keywords are interaction, intentionality, norm, culture, is concerned with micro-social aspects of gender building. Gender is in this case, a structure based on agreement of society with the fact that people, named men and women, have certain characteristics defined as feminine or masculine. It is about a cultural approach to gender versus a natural one. **Interactionists**, who believe that the status of an individual in a group is built from small details of daily life, believe also that the socialization process encourages women and men to develop certain personality traits, which determine their gender roles.

To explain the institutional dimension, the **social constructivists** focus their studies on the interactions between individuals and institutions. They say that gender is built, cognitive categories and institutions being more important for it than situations. Constructivist sociologists perceive both sex and gender as socially built products. According to them, neither gender differences, nor gender inequalities are inevitable. Neither can they be explained by sheer reference to gender socialization of children. Biological differences do not underlie gender differences, which are rather a product of gender inequality and not otherwise. Societies that define masculinity through physical strength will encourage men to cultivate a certain type

¹⁶ F. Engels, *Originea Familiei, Proprietății Private și a Statului*, București: Editura Politică. 1967.

of body image and *patterns* of behaviour that potentially could contribute to some gender inequalities. From the constructivist perspective, individuals negotiate their gender identities within societies, which are “gendered” in their turn, while these societies, through their social institutions, produce precisely the differences that we assume to be specific to individuals.

1.3.3. Gender and feminism

Feminism is a set of theories, social and political movements, and philosophies motivated by the interest in the social, political, economic equality between women and men and finding solutions to reducing gender discrimination in society. Throughout its evolution, this social movement developed in several forms, inspired by various schools of thought (liberal, Marxist, socialist, radical feminism etc.).¹⁷

Ann Oakley, Judith Lorber, Sandra Harding, Dorothy Smith, Julia Kristeva, Bell Hooks, Jessie Bernard, Shulamit Reinhardz, Arlie Hochschild, Uma Narayan, Rossi Braidotti, Judith Butler etc. are just a few representatives of the feminist movement, with significant contributions in the area of sociology, as well as philosophy, psychology, cultural studies etc.

Women’s movement originated in the US and has gone through several waves of feminism:

- **Wave 1 (rights, 1848-1920).** Begins with the “Declaration of Sentiments” by Elisabeth Cady Stanton in Seneca Falls. Also referred to as the “suffragette movement”, it is the period when women begin to obtain the right to vote through street movements.
- **Wave 2 (freedoms, 1960s-1970s).** A period of epistemological riots, heavily influenced by two bestselling books: “The Second Sex” by Simone de Beauvoir and “The Feminine Mystique” by Betty Friedan. The main topics of interest become: domestic violence, marital rape, sexual harassment, reproductive health, liberalization of abortion, access to higher education, and access to labour market.
- **Wave 3 (autonomy, 1990s - present).** In the context of the post-colonial, post-socialist and globalised world, consumerist and information societies, representatives of the new wave, young feminists, put the emphasis on the differences between women, not only between women and men, multiple identities, diversity and relevance of plurality of experiences revaluation of sexuality in all its stances.¹⁸

The feminist movement is the movement that contributed, to the greatest extent, to changes in research focused on gender differences and inequalities. Extremely intense and systematic criticism of the 1950s, the great traditional systems of thought, resized and enhanced gender research in the early 1970s. During the feminist movement, gender becomes the subject of systematic studies, and is enlisted among the explicitly addressed research themes.

¹⁷ Джейн л. Томпсон, Джудит Пристли, Социология: Вводный курс, Львов: «Инициатива», 1998.

¹⁸ Ștefania Mihăilescu, Din istoria feminismului românesc, Iași: Editura Polirom, 2006.

Gender studies or sociologically oriented feminist studies also underwent various stages. Initially, attempts were made to incorporate gender issues in sociological research by adding the gender perspective (i.e. the sex variable), where it was obviously missing. However, feminism also advocated for the introduction of issues and topics of particular interest to women such as maternity, sexuality, domestic violence, domestic activity, public-private relationship, reconsidering the social institutions from a gender perspective, etc. in the social research.

In the next stage, the feminist research tried not only to criticize but also to theorize from a feminist perspective, some gender issues. The emphasis changed to studying the gender as a generator of social structure and gender analysis in conjunction with other components of inequality: race, class, sexual orientation, age, education etc. This was an expansion of issues correlated with an effort to include more than to exclude.

Gender is defined and applied differently, depending on the feminist movement. Thus, radical feminism of the 1980s defines gender as a system of men's domination through the control of women's sexuality and reproductive capacity. Marxist feminism emphasizes the gender division of labour and focuses on the analysis of how such institutions as the economy and family structure women's lives. Liberal feminism stresses the importance of gender socialization and believes in political and legislative reform as a solution to gender equality. In summary, it can be said that the feminist research in sociology contributed to:

- ❖ gender “*empowerment*” – if many intellectual traditions ignored gender or treated it as derivative, feminism brought gender in the centre of sociological investigation;
- ❖ “*revival of new theoretical and empirical resources*” – women's experiences become more and more popular;
- ❖ “*widening the scope of research themes*” – in addition to contributions to the creation of new areas of research (e.g. sociology of gender) or to criticism of patriarchy from multidisciplinary perspectives, feminist research opened new areas of research on such issues as: motherhood, domestic violence, rape, sexual harassment, domestic work, etc.;
- ❖ “*development of interdisciplinary research*”.¹⁹

In general, gender studies underwent several stages in their development.²⁰

The *first stage* refers to **feminist studies**, which date back in the 1970s. These studies, which are determined by liberal ideas such as emancipation/empowerment, equality, autonomy, were influenced by youth movements from the late 1960s, the sexual revolution, which has spurred a new stage in the development of feminism.

Theoretical analysis of gender relations has become necessary due to changes in

¹⁹ Lazăr Vlăsceanu (coord.) Manual de Sociologie, Capitolul „Gen și societate” de Laura Grunberg B. Polirom, 2010.

²⁰ Baurciulu Anjela, Belostecinic Marina, Casian Angela, Pârțachi Ion, Petroia Andrei. Bugetare sensibilă la gen, Manual, Chișinău ASEM, 2009.

feminists' goals. The fight for equal rights between men and women, which has already been included in the legislation of several countries, was replaced with the fight for equal opportunities and recognition of women's social experience. At that time, the unreasonably forgotten names of women who contributed in this field were remembered and rediscovered. During that period, sociologists tried to highlight the differences between men and women, their impact on the demographic situation, teachers revealed peculiarities in the education of girls and boys, male writers studied the style of female writers. University chairs, institutes and research centres were established to study gender issues, various teaching materials and special magazines were published. Discussions were initiated about the status of women, the phenomenon of gender discrimination in various spheres of social life, women's limited access to education, politics and other professions. In 1975, which was named by the UN the International Women's Year, the American researcher Nynne Koch coined the term "feminology" and thus, set up a new field of interdisciplinary research, encompassing all aspects of the women's social and human life and women's status and roles.

The second stage in the development of gender studies was the recognition of feminist studies and the emergence of the so-called men's studies (social andrology), which developed as a response to the magnitude of the feminist movement in the 1980s, as well as a need to revise the contents of men's gender roles. Both the studies on the situation of women and those on the situation of men contributed to: the recognition of the feminist idea, the emancipation of women and the release of the society from stereotypes; the emergence of research focused on the situation of men and wider dissemination of **gender studies**. One of the prerequisites for the emergence of gender studies was the fact that men, as subjects of social relations, cannot be ignored in social research.

The third stage (late 1980s - early 1990s) was characterized by outlining and exploring new cultural and social aspects of gender. During that period, the emphasis of gender studies was put on the relationship between science, power and gender. Researchers involved in the development of gender studies often did not share the feminists' ideas, which led to a polarization between the ideas of the radical feminists and those of liberal feminists and a wider gap between the American and the European (particularly the French) *gender schools*.

The fourth stage (late 1990s to present) is characterized by the orientation of gender studies in the context of globalization. Currently, gender studies are acknowledged and have become a recognized field of research in virtually all the world's countries. The number of various research projects in the field of gender relations is increasing in Western Europe, Africa, Middle East, Asia and Latin America. Numerous international congresses and conferences organized at the highest level contribute to an intense exchange of information between researchers and professors and, therefore, to the ongoing development of gender studies. Educational programmes in this area have now become international and focus on such areas as gender equality in politics and economy, discrimination against women and sexual minorities, refugee problems etc.

Thus, gender has become a key concept in social life that creates, suggests and requires action. Gender studies, which are currently extremely popular, during their development gradually changed their topics in line with changes in social

and human life. From critical approaches suggested by radical feminists who advocated for emancipation of women in all areas: family life, work, community life and political activity, etc., the studies currently focus primarily on the principle of gender equality, which can be achieved by using a gender-based approach to all the promoted public policies. Such an approach can only be achieved through a **gender analysis**.

Checklist

1. ***What is “gender”?***
2. ***When did the concept of “gender” emerge and what were the prerequisites for the emergence of this concept?***
3. ***What is the difference between “sex” and “gender”?***
4. ***Please describe how “masculinity” versus “femininity” is manifested in modern society.***
5. ***Which factors determine the formation of gender stereotypes in a society?***
6. ***What is the meaning of the concept “gender role”?***
7. ***Which are the specific traits of androgynous behaviour?***
8. ***Which sources generate complicated inequality between women and men and as a consequence of gender discrimination?***
9. ***How did classical philosophical theories interpret relations between women and men?***
10. ***What is the essence of biodeterminist, functionalist, and conflictualist theories concerning the gender relations?***
11. ***What are “gender studies”?***
12. ***What is role of feminist movements in the development of gender relations in modern society?***

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Topic 2. GENDER MAINSTREAMING – STRATEGY FOR POLICY TRANSFORMATION AND GENERATION OF GENDER EQUALITY IN THE SOCIETY

Keywords: *mainstreaming of gender equality, integration of the gender dimension, gender mainstreaming, vertical and horizontal dimensions.*

2.1. Historical and conceptual framework on mainstreaming of gender equality

Over the course of development of the modern society, the topic of gender was raised since the beginning of the 20th century in a number of events and declarations at the international level, such as:

- **in the 1940s-1960s**, the welfare approach perceived women as passive beneficiaries. However, gender equality becomes for the first time a key-element of the system of human rights, being included in the 1948 Universal Declaration of Human Rights.¹
- **in the 1970s and 1980s**, the equity and effectiveness approach challenged the subordinate position of women and aimed at increasing their level of participation. One of the milestones in promoting gender equality was *The Convention on the Elimination of all Forms of Discrimination against Women* (CEDAW) adopted by the UN in 1979.² The Convention defined the notion of discrimination against women, as well as provided an agenda for actions at the national level to abolish all forms of discrimination.

During the debates in the UN Commission on the Condition of Women on the issue of the role of women in the developing countries, the idea was formulated that decisions can have a different impact on women compared to men. Consequently, the concept of **gender mainstreaming** was used for the first time during the 3rd *World Conference on the Condition of Women* (Kenya, Nairobi, 1985)³, and the participating governments undertook to implement the guidelines contained in the *Future Action*

¹ *Ghid privind situația femeii în cadrul pieței muncii*, Agenția Națională pentru Ocuparea Forței de Muncă România în parteneriat cu Instituto de Formacion Integral S.L.U. Madrid, proiectul „Promovează Femeia” OSD/71/6.3/S/33543 - Programul Operațional Sectorial Dezvoltarea Resurselor Umane 2007-2013, Axa Prioritară 6 «Promovarea Incluziunii Sociale», Domeniul Major de Intervenție 6.3 „Promovarea egalității de șanse pe piața muncii”. Available at: <http://genderbudgets.ru/biblio/ghid-5-v4.pdf>

² <http://www.un.org/womenwatch/daw/cedaw/history.htm>

³ The UN's Third World Conference on Women, Nairobi, 1985. http://www.5wwc.org/conference_background/1985_WCW.html

Strategies to Promote Women, adopted in Nairobi.⁴

- **in the 1990s**, an empowerment and gender approach aimed at transforming the existing gender relations by means of equal control and equal distribution of resources. The 4th *UN International Conference on the Condition of Women* held in 1995 in Beijing resulted in the adoption of a *Platform for Action*, which provides the following: “Equality between men and women is an issue pertaining to the field of human rights and a key condition for social justice, being as well fundamental for the achievement of equality, development and peace”.⁵

The Conference pleaded for the promotion of *gender mainstreaming* at the international level. This shall be achieved by integrating gender perspective into all policies and programmes so that the effects thereof on men and women be weighed both before their adoption and after their implementation.⁶

- **in 2000**, at the UN Summit held in September The 8 Millennium Development Goals (MDGs) were adopted for a period of 15 years, up to 2015, targeting the main human development challenges. The actions and tasks included in the Millennium Declaration were signed by 147 heads of state and adopted by 189 countries. Out of the eight goals, the 3rd one “Promoting gender equality and empowerment of women” focuses explicitly on gender equality. Moreover, it was provided that all other goals need to be considered and assessed in terms of gender equality.

In order to assess the progress achieved by each country in implementing the MDGs, 18 targets and 48 indicators were identified. In 2015 based on the said indicators, the level of achievement of the MDGs⁷ was assessed and reported for individual countries, as well as regions.

- **in the period 2000-2015**, *gender mainstreaming* is promoted vigorously by the majority of countries signatories of the Beijing Convention. The consolidated efforts of the European Union to promote gender equality at the community level are of special interest. The issue of gender mainstreaming is approached by the European Union starting with the year 1995. The institutions of the EU and the Council of Europe embraced and promoted the new concept both in their own structures and policies and in the legislation applied by the member states. In 1996, at the initiative of the Council of Europe the *Specialist group on gender mainstreaming* was set up to draft a number of methodology documents for the benefit of member states. The stages of promoting gender equality in the EU treaties and strategies are outlined in Box 6.1.

in 2015, on 12 August, the *UN General Assembly* adopted a new universal Agenda for Sustainable Development, which builds on the Millennium Development Goals and

⁴ Bocioc F., Dimitriu D., Teșiu R., Văileanu C., *Gender mainstreaming: metode și instrumente. Ghid practic pentru abordarea integratoare a egalității de gen*, București, CPE 2004, p.9.

⁵ The UN’s Third World Conference on Women, Nairobi, 1985 http://www.5wwc.org/conference_background/Beijing_Declaration.html

⁶ See paragraphs 79, 105, 123, 141, 164, 189, 202, 229, 238, 252, 273 of the Platform for Action. The full text is available at: <http://www.un.org/womenwatch/daw/beijing/platform/index.html>

⁷ <http://www.undp.org/content/undp/en/home/librarypage/mdg/the-millennium-development-goals-report-2015.html>

Promoting gender equality in the treaties and strategies of the European Union

Boxa 2.1.

1957

Treaty of Rome. The treaty establishes the principle of equal pay for equal work (Article 119).

1996

Communication of the European Commission „Incorporating equal opportunities for women and men into all Community policies and activities”. In February 1996, the European Commission published this document explaining the new method of gender mainstreaming.

1999

Treaty of Amsterdam. The consolidated treaty is the legal basis for the community action to promote equality between men and women. Articles 2 and 3 formalise the community commitment to integrate the gender perspective as a specific task of the community, as well as a horizontal objective affecting all community policies and programmes.

2003

Resolution of the European Parliament on gender mainstreaming contains a commitment to adopt and implement a policy plan to permanently integrate the gender perspective and provides guidelines for gender mainstreaming in the committees and the political activity of the delegations.

2006

European Pact for gender equality is the EU roadmap for equal opportunities for men and women for the period 2006-2010.

2007

Treaty on the functioning of the European Union (TFEU). Article 19 of TFEU is the legal basis for actions to combat discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation.

2008

Communication „Non-discrimination and equal opportunities: a renewed commitment „. The Communication establishes the Commission’s framework to carry out various actions to combat discrimination.

2009

Treaty of Lisbon - includes improvements to the social dimension of the European Union. The principle of non-discrimination and equality between men and women is added to the values of the European Union (Article 2 of TEU) and legal provisions are adopted to combat discrimination and advance equality between men and women (article 3 of TEU).

2010

Charter of Fundamental Rights. Article 21 affirms the principle of non-discrimination, including based on sex. Article 23 refers to the rights of women and gender equality and stipulates that “equality between men and women must be ensured in all areas, including employment, work and pay”.

2010 -
2015

Strategy for Equality between Women and Men 2010-2015.

2011 -
2020

European Pact for Gender Equality 2011-2020.

Source: <http://eige.europa.eu/gender-mainstreaming/what-is-gender-mainstreaming>

includes new objectives. The new Agenda covering the period **2015-2030**,⁸ contains 17 goals with 169 targets covering three dimensions of a sustainable development: economic, social and environmental. Objective 5 “Gender Equality - Achieve gender equality and empower all women and girls” of the 2030 Agenda for Sustainable Development includes nine complex and multidimensional targets. Besides this, 10 other objectives included in the Agenda contain targets related to the gender issue, such as reducing maternal mortality (Objective 3), eliminating gender disparities in education (Objective 4), achieving full and productive employment and decent work for men and women (Objective 8).

Conceptual development of gender mainstreaming

Mainstreaming is a way to promote and disseminate new visions and approaches by means of strategic transformation of policies. *Below are some definitions* of gender mainstreaming given by international instruments:

| | |
|--|--|
| <p>United Nations:</p> <p><i>Beijing Platform for Action, 1995</i></p> | <p>Gender mainstreaming was endorsed and defined as the approach to achieve the objectives contained in each of <i>the critical areas of interest</i>, namely: “Governments and other actors should promote an active and visible policy of integrating a gender perspective into all policies and programmes, so that, before decisions are taken, an analysis is made of the effects on women and men, respectively”.</p> |
| <p><i>United Nations Social and Economic Council presented in July 1997 its definition of gender mainstreaming</i></p> | <p>„Mainstreaming a gender perspective is the process of assessing the implications for women and men of any planned action, including legislation, policies or programmes, in all areas and at all levels. It is a strategy for making women’s as well as men’s concerns and experiences an integral dimension of the design, implementation, monitoring and evaluation of policies and programmes in all political, economic and societal spheres so that women and men benefit equally and inequality is not perpetuated. The ultimate goal is to achieve gender equality.”²</p> |
| <p>United Nations Development Programme (UNDP)</p> | <p>„Mainstreaming gender equality concerns into all policies, programs, activities and financial administrative and organizational procedures, thereby contributing to a profound organizational transformation. Specifically ... integrating the results of socio-economic and political assessment into all decision-making processes of the organization and follow-up. This includes both major political decisions of the organization, and everyday policy implementation decisions.”³</p> |

⁸. Sustainable Development, 17 goals to transform our world: <http://www.un.org/sustainabledevelopment/>

| | |
|---|--|
| European Union. Definition given by the Council of Europe: | <i>“Mainstreaming is the (re)organization, improvement and evaluation of the decision-making to incorporate perspective of equality between women and men in all areas and at all levels by stakeholders, typically in the practical application of policies.”⁴</i> |
|---|--|

Mainstreaming is different from the previous approaches to gender equality, which are important but cannot cure structural inequalities in the professional and family life, which constrain the women’s participation in the labour market and public life. Gender mainstreaming is *complementary* to the gender equality policies. While gender equality policies are purposefully established to solve a specific problem, which stems from gender discrimination or a historical imbalance (for example, race relations and equal pay), *gender mainstreaming* is a *systematic strategy* to bring gender equality into the public’s attention as a permanent objective of the public policies.⁹

The complexity of gender mainstreaming is given by its two dimensions:

- **horizontal dimension**, which is related to the level of development of the infrastructure (transport units, communications etc.) and of the necessary resources (human, material, financial, information/documents);
- **vertical dimension**, which refers to clearly assuming the strategy as an act of political will and involving the structures and decision-makers in all stages of the process of social reform. It also implies making use of specific tools and assigning clearly defined responsibilities to specific stakeholders.¹⁰

The process of evolving from a concept to the definition of a complex reform strategy took several years and necessitated joint efforts of many experts in various fields. Presently, there is a solid methodology basis, tools and working methods that could be used to achieve gender equality in all areas of activity and all levels of decision-making.

2.1. Outcomes of promotion and strategic directions in ensuring gender equality worldwide

Promotion of gender mainstreaming on the global, regional and national levels over the last 20 years resulted in a complex framework of methodology, techniques and implementation tools, as well as a series of evaluation and progress indicators, which allow for an assessment of the current situation in this field. In this respect, it is necessary to present the existing reports on the results of gender equality promotion compiled by the international bodies involved in this process, among which we would like to emphasize the following:

⁹. Bocioc F., Dimitriu D., Teșiu R., Văileanu C., *Gender mainstreaming: metode și instrumente. Ghid practic pentru abordarea integratoare a egalității de gen*, București, CPE 2004, p. 15..

¹⁰. Idem, p.10.

Implementing the Beijing Platform for Action 1995-2015 (Beijing+20);¹¹

The Millennium Development Goals Report 2000-2015;¹²

Global Gender Gap Report;¹³

Report on gender equality at the EU level.¹⁴

Implementing the Beijing Platform for Action 1995-2015

During the 59th session of the Commission on the Status of Women held on 9-20 March 2015, the main topic was the implementation of the Beijing Declaration and Platform for Action, including current challenges in the implementation and ensuring gender equality and empowerment of women. The Commission undertook an appraisal of the progress achieved in the 20 years since the adoption of the 1995 Beijing Convention¹⁵ (monitoring was done every 5 years¹⁶).

In 1995, the advocates of gender equality brought into discussion the lack of empowerment and multiple violations of human rights facing women and girls, as well as the need for legislation and comprehensive policies, and for transformation of formal institutions (national and global governance bodies) and informal ones (family, community). Twenty years later, there is a record number of 164 countries who committed to promote the status of women.¹⁷

Overall, it was found that gender inequalities are usually overlapping with other forms of inequality. The Platform for Action covers 12 critical areas which today are as relevant as they were 20 years ago: poverty; education; violence; armed conflicts; economy; power and decision-making; institutional mechanisms; human rights; media; environment; girl child. The reports presented at the 59th session cover progresses made in every country and region in each of the 12 areas.¹⁸

While some progress was made in the last two decades, the initial plan is only partially accomplished. Based on the lessons learned in the implementation of the Platform for Action, a number of urgent measures in five global priority areas were identified to accelerate progress:

1. transforming discriminatory social norms and gender stereotypes;
2. transforming the economy to achieve gender equality and sustainable development;
3. ensuring full and equal participation of women in the decision-making at all levels;

¹¹. Available at: <http://www.unwomen.org/en/csw/csw59-2015>

¹². Available at: [http://www.un.org/millenniumgoals/2015_MDG_Report/pdf/MDG%202015%20rev%20\(July%2011\).pdf](http://www.un.org/millenniumgoals/2015_MDG_Report/pdf/MDG%202015%20rev%20(July%2011).pdf)

¹³. Available at: <http://www.weforum.org/reports/global-gender-gap-report-2015>

¹⁴. Available at: <http://eige.europa.eu/about-eige/documents-registry>

¹⁵. Available at: <http://www.unwomen.org/en/csw/csw59-2015#sthash.LwnOQrBP.dpuf>

¹⁶. Progress reports on the implementation of the Platform for Action, Beijing 1985. E/2005/27-E/CN.6/2005/11; <http://www.unwomen.org/~media/headquarters/attachments/sections/csw/59/ecn620153.pdf>

¹⁷. Available at: <http://beijing20.unwomen.org/en/in-focus/beijing-at-20#sthash.NTk5b2Nl.dpuf>

¹⁸. Document E/CN.6/2015/3 <http://www.unwomen.org/en/csw/csw59-2015/official-documents>

4. significantly increasing investment in gender equality; it is critical that fiscal and monetary policies be adjusted to increase public expenditures related to gender equality, as well as monitor and appraise the effects employing a gender responsive budget;
5. consolidating the responsibility for gender equality and the realization of the human rights of women and girls.

Currently, for each critical area strategic objectives have been identified, as well as a detailed list of connected actions to be undertaken by the Governments and other stakeholders at the national, regional and international levels.

Implementation of the Millennium Development Goals 2000-2015¹⁹

In 2000, the UN General Assembly set 8 Millennium Development Goals (MDGs) for the period 2000-2015, addressing the main challenges to human development. A number of 191 countries signed the document. In 2015, a significant progress was reported on the established measurable indicators specific to MDGs.²⁰ MDG-3 “Promote gender equality and empower women” explicitly addressed gender equality.

¹⁹. Available at: [www.un.org/millenniumgoals/2015_MDG_Report/pdf/MDG%202015%20rev%20\(July%201\).pdf](http://www.un.org/millenniumgoals/2015_MDG_Report/pdf/MDG%202015%20rev%20(July%201).pdf)

²⁰. The Millennium Development Goals Report 2015, pp. 28-31 <http://www.undp.org/content/undp/en/home/librarypage/mdg/the-millennium-development-goals-report-2015.html>

Summary of results related to advancement of gender equality and empowerment of women MDG-3

| Main targets MDG-3 | Summary of results in 2015 |
|--|--|
| Eliminate gender disparity in primary and secondary education, preferably by 2005, and in all levels of education no later than 2015 | <p>The developing regions as a whole have achieved the target to eliminate gender disparity at all levels of education, with a gender parity index of 0.98 in primary and secondary education and 1.01 in tertiary education in 2015.</p> <p>For example, in Southern Asia in 1990 only 74 girls were enrolled in primary education for every 100 boys. In 2015, there were 103 girls enrolled for every 100 boys.</p> |
| Women's access to paid employment continues to expand | The proportion of women in paid employment outside the agriculture sector has increased from 35 per cent in 1990 to 41 per cent in 2015. |
| Women remain at a disadvantage in the labour market | <p>As of 2015, about 50 per cent of all working-age women (aged 15 and above) are in the labour force, compared to 77 per cent of men.</p> <p>Despite their progress in education, women face a more difficult transition to paid work and receive lower earnings than men. Globally, women earn 24 per cent less than men, with the largest disparities found in Southern Asia (33 per cent) and sub-Saharan Africa (30 per cent).</p> <p>Of 92 countries with data on unemployment rates by level of education for 2012–2013, in 78 countries women with advanced education have higher rates of unemployment than men with similar levels of education.</p> |
| Women's political representation has increased, but parity remains a distant goal | <p>Over the last 20 years, women in parliament have gained ground in nearly 90 per cent of the 174 countries.</p> <p>The global average proportion of women in parliament has nearly doubled, growing from 11 per cent in 1995 to 22 per cent in 2015.</p> <p>However, there is only 1 woman member of Parliament for every 5 men.</p> |

Source: *The Millennium Development Goals Report 2015*, pp. 28-31, http://www.undp.org/content/dam/undp/library/MDG/english/UNDP_MDG_Report_2015.pdf.

Global Gender Gap Report²¹

The World Economic Forum in its Global Gender Gap Report measures the extent of gender disparities, as well as their progress over time. While no single indicator can reflect the whole situation, the Global Gender Gap Index (GGGI) attempts to measure the relative discrepancies between women and men in four key areas: health, education, economy and politics.

GGGI was developed in 2006 out of the need to measure gender equality in a coherent and comprehensive manner and to follow the progress of a given country. There are three concepts underlying the Gender Gap Index, which form the basis for its methodology, namely:

Firstly, the Gender Gap Index (GGI) is designed to measure gender discrepancies in relation to the access to resources and opportunities in different countries rather than the actual levels of the available resources and opportunities in those countries (their level of development).

Secondly, GGI captures gaps primarily in outcome variables rather than in input variables. The aim of such assessment is to provide an outlook on the situation of men and women by means of outcome indicators related to the fundamental rights, such as: health, education, economic participation and political empowerment. For example, GGI contains one indicator reflecting the discrepancy between men and women holding highly skilled jobs, such as legislators, senior officials and managers (an outcome indicator), but does not include data on the duration of maternity leave (a policy indicator).

Thirdly, GGI ranks countries according to their proximity to gender equality rather than to women's empowerment. The aim is to focus on whether the gap between women and men in the chosen indicators has declined, rather than whether women are "winning" the "battle of the sexes".

The Global Gender Gap Index examines the gap between men and women in four fundamental categories: Economic Participation and Opportunity, Educational Attainment, Health and Survival and Political Empowerment. *Box 2.3* displays all four of these categories and the 14 different indicators that compose them.

²¹. Available at: <http://www.weforum.org/reports/global-gender-gap-report-2015>

Evaluation indicators of the Global Gender Gap Index (GGGI)

| Fundamental categories | Evaluation indicators |
|---|--|
| Economic Participation and Opportunity | <ol style="list-style-type: none"> 1. Gap in labour force participation (rate of participation in the labour market) 2. Gap in wage for similar work: <ol style="list-style-type: none"> a.) ratio between female estimated earned income and male value; b.) equal pay for similar work. 1. Gap in advancement: <ol style="list-style-type: none"> a.) ratio between female legislators, senior officials and managers and male value; a.) ratio between female professional and technical workers and male value. |
| Educational Attainment | <p>Ratio between girls and boys, women and men</p> <ol style="list-style-type: none"> 1. in primary education; 2. in secondary education; 3. in tertiary education. <p>*** A longer-term view of the country's ability to educate women and men in equal numbers is captured through the ratio of the female literacy rate to the male literacy rate.</p> |
| Health and Survival | <ol style="list-style-type: none"> 1. Sex ratio at birth; 2. Gap between women's and men's healthy life expectancy. (This measure provides an estimate of the number of years that women and men can expect to live in good health by taking into account the years lost to violence, disease, malnutrition or other relevant factors. |
| Political Empowerment | <ol style="list-style-type: none"> 1. Ratio between females at ministerial level and male value; 2. Ratio between females with parliamentary seats and male value; 3. Ratio between number of years of a female head of state/government in the last 50 years and male value. <p>*** A clear drawback in this category is the absence of any indicators capturing differences between the participation of women and men at local levels of government.</p> |

Source: Global Gender Gap Report 2015, www.weforum.org/reports/global-gender-gap-report-2015.

One important aspect is that GGGI provides examples of models to be followed, countries that are leaders at equitably distributing resources between women and men, regardless of the general level of available resources. In some countries, the progress is fast regardless of the level of income and the starting point, while in others the change is slow or negligible. The overall situation is presented in Table 2.1.

Table 2.1.

**GGGI by fundamental categories,
progress over the period 2006-2015**

| Fundamental categories | 2006 (115 coun-tries) | 2015 (145 coun-tries) | Gap evolution |
|---|--------------------------|--------------------------|------------------|
| Economic Participation and Opportunity | 56 | 59 | +3 |
| Educational Attainment | 92 | 95 | +3 |
| Health and Survival | 95 | 96 | +1 |
| Political Empowerment | 14 | 23 | +9 |
| Global Gender Gap Index | 64 | 68 | +4 |

Source: Global Gender Gap Report 2015, p. 31-32, <http://reports.weforum.org/global-gender-gap-report-2015>.

A decade of data shows that the only 59% of the gender gap in the *Economic Participation and Opportunity* was closed in 2015, with a slow improvement of 3% over 2006. In *Educational Attainment* sub-index, 95% of the gap between men and women was closed, an improvement of 3% over 2006. The *Health and Survival* sub-index is the closest to parity and stands now at 96%, a 1% improvement over 2006. While the *Political Empowerment* sub-index saw the best improvement of 9% over 2006, the gap in this category is the widest, only 23% being closed in 2015.

In the top 20 performing countries (Figure 2.1), the gender gap in the categories of education and health is insignificant and the index is close to parity. However, there are important discrepancies in the *Economic Participation and Opportunity* sub-index – the difference between Iceland and Latvia is 0.086 pp., while in *Political Empowerment* sub-index the difference between Iceland (0.719) and Latvia (0.246) is highest and stands at 0.473 pp.

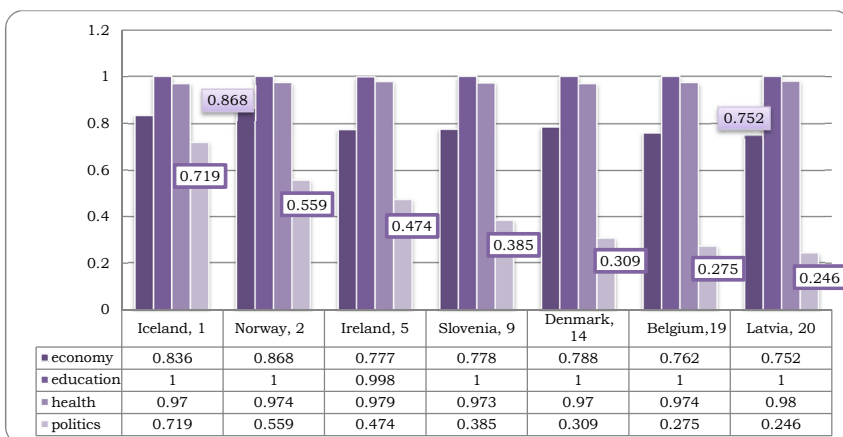


Figure 2.1. Gender Gap Index, regional, 2015 (Top 20 countries)

Source: Author's estimates based on the Global Gender Gap Report 2015.

The Republic of Moldova which ranked 26th shows a significant gender gap in the *Political Empowerment* category, where the indicator value is 0.195 and a lower gap in the *Economic Participation and Opportunity* sub-index (0.797). Thus, the Republic of Moldova ranks higher than Austria (37) which scores better in the *Political Empowerment* category (0.246), but does worse in the *Economic Participation and Opportunity* sub-index (0.705). Similarly, the other countries included in Figure 3.2 display differences in the two mentioned categories.

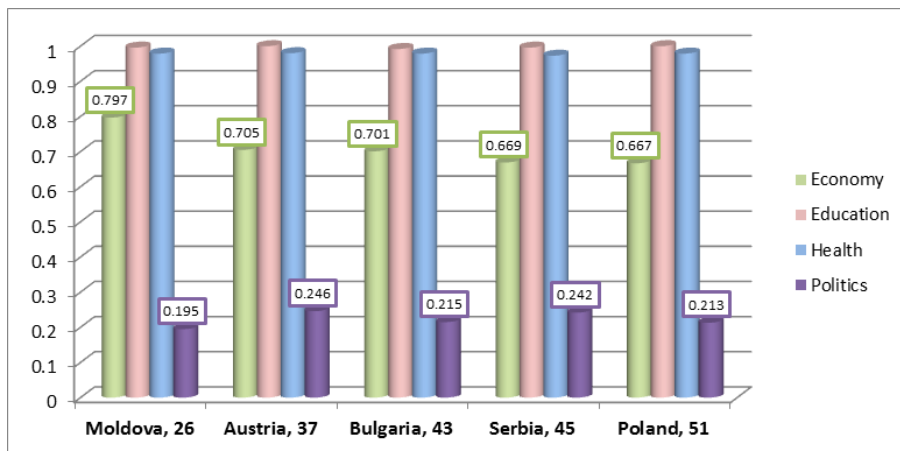


Figure 2.2. Gender Gap Index, region 2015

Source: Author based on the Global Gender Gap Report 2015.

A similar situation can be observed for the region as a whole, where the gender gap in the *Economic Participation and Opportunity* category varies between the Slovak Republic with 0.638 (the lowest) and Russia and Ukraine with 0.731. In the *Political Empowerment* category, Hungary scores lowest with 0.035, and Albania – highest with 0.214.²²

²² Global Gender Gap Report 2015. <http://reports.weforum.org/global-gender-gap-report-2015/>

The gender gap is a combined outcome of various social, economic, political and cultural variables. Thus, the Governments have a key role in eliminating or preserving such gaps, which are intrinsically linked to the national policies in effect. Moreover, the Governments must align their efforts with those of the business community and civil society to reduce the gender disparities. Hence, the need to promote cooperation between the public and private sectors to close gender gaps, based on the analytical tools provided by the Global Gender Gap Report.

The Global Gender Gap Report provides a full set of data and a gap tracking mechanism to allow the Government to determine their objectives in the framework of own economic, political and cultural environment.

Gender mainstreaming at the EU level²³

At the European Union level, the common efforts to promote gender mainstreaming resulted in a number of methods, techniques and tools to be employed by the member states. In order to strengthen and promote gender equality, including by integrating the gender dimension into all EU and national policies, in 2006 the European Institute for Gender Equality (EIGE)²⁴ was established as an autonomous body of the European Union.²⁵

The European Parliament and the Council of the European Union defined the specific tasks of the Institute, assigning it a central role in promoting equality between women and men at the EU level. The Institute became the European centre of knowledge in the field of gender equality, an independent source of information and data regarding gender equality.

Adequate statistical data and measures are critical components of the gender mainstreaming policies.²⁶

The *Gender Equality Index* (GEI) is a composite indicator that provides a measure – across Member States and over time – of the complex concept of gender equality.²⁷ It measures gender gaps within a range of areas relevant to the EU policy framework (Figure 3.3). The Index is formed by combining these gender indicators into a single summary measure.

The Gender Equality Index provides scores for three years – 2005, 2010 and 2012 – and the 28 member states of the European Union.²⁸ The trends in the gender equality indicators for each domain, as well as in the composite index are provided in Table 3.2.

²³. Available at: <http://eige.europa.eu/about-eige>.

²⁴. Regulation No. 1922/2006 of the European Parliament and of the Council of 20 December 2006 on establishing a European Institute for Gender Equality.

²⁵. Available at: <http://eige.europa.eu/about-eige>

²⁶. The Gender Equality Index 2015 Report, *Measuring gender equality in the European Union 2005-2012*. Available at: <http://eige.europa.eu/gender-statistics/gender-equality-index/about>

²⁷. Available at: <http://eige.europa.eu/sites/default/files/documents/mh0215616enn.pdf>

²⁸. *Idem*, p. 12, <http://eige.europa.eu/gender-statistics/gender-equality-index/about>

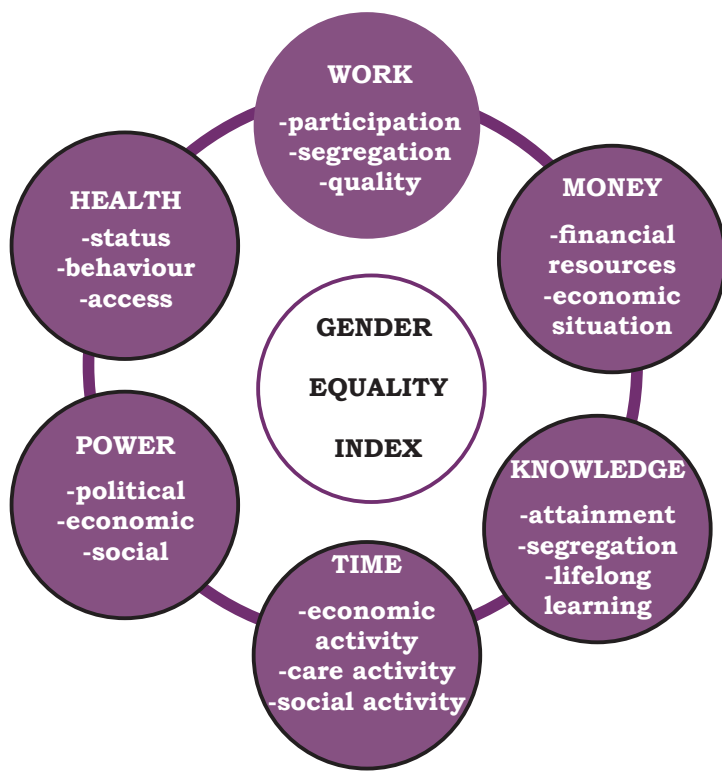


Figure 2.3. Main domains of gender equality at the EU level

Source: *The Gender Equality Index 2015 Report, Measuring gender equality in the European Union 2005-2012*, p.12

Table 2.2.

Gender Equality Index, by domains, and progress recorded during 2005-2012

| Domain | 2005 | 2010 | 2012 |
|-----------------------------|------|------|------|
| Work | 61,1 | 62,2 | 61,9 |
| Money | 64,1 | 67 | 67,8 |
| Knowledge | 52,1 | 49,1 | 49,1 |
| Time | 41,5 | 37,6 | 37,6 |
| Power | 31,4 | 37,9 | 39,7 |
| Health | 87,8 | 90 | 90 |
| Gender Equality Index EU 28 | 51,3 | 52,4 | 52,9 |

Source: Gender Statistics, Domains, <http://eige.europa.eu/gender-statistics/gender-equality-index/2012/domain/>.

It can be noted that the best situation with the gender equality is in the *Health* domain, where status, behaviour and access to medical services were rated at 90% in 2010 and 2012. At the same time, the indicators pertaining to the *Power* and *Time* domains are relatively low, namely under 40%. The *Knowledge* domain witnessed a decreasing trend from 52.1% in 2005 to 49.1% in 2012 (this can be explained by new members joining the EU having a lower development level).

In addition to these six core domains, starting in 2013, two satellite domains are surveyed, namely violence and intersecting inequalities. Since these two domains are complementary, the selected indicators have a purely informative character, but they overlap with the gender inequalities in the appraised domains and should be taken into consideration when designing complex measures to combat gender inequalities.

Currently, the EU efforts to promote gender equality in each member state, as well as on the community level, are contained in the **European Pact for Gender Equality 2011-2020**, adopted on 7 March 2011. The new Pact was drafted in close connection with the **Europe 2020 Strategy** and the **Strategy of the European Union for jobs, a smart, sustainable and inclusive growth**.

Box 2.4.

Commitments and actions to close gender gaps

| Main commitments | Measures to close gender gaps |
|--|--|
| Close gender gaps in the labour market and social protection domain | <p>promote women’s employment in all age brackets and close gender gaps in employment, including by combating all forms of discrimination;</p> <p>eliminate gender stereotypes and promote gender equality at all levels of education and training, as well as in working life;</p> <p>ensure equal pay for equal work and work of equal value;</p> <p>promote women’s empowerment in political and economic life and advance women’s entrepreneurship;</p> <p>encourage the social partners and enterprises to develop and effectively implement initiatives in favour of gender equality and promote gender equality plans at the workplace;</p> <p>promote the equal participation of women and men in decision-making at all levels and in all fields, in order to make full use of all talents.</p> |

| Main commitments | Measures to close gender gaps |
|---|--|
| Promote better work-life balance for women and men | <p>improve the supply of adequate, affordable, high-quality childcare services for children under the mandatory school age;</p> <p>improve the provision of care facilities for other dependants;</p> <p>promote flexible working arrangements and various forms of leave for both women and men.</p> |
| Tackle all forms of violence against | <p>adopt, implement and monitor strategies at national and European Union level with a view to eliminating violence against women;</p> <p>strengthen the prevention of violence against women and the protection of victims and potential victims, including women from all disadvantaged groups;</p> <p>emphasise the role and responsibility of men and boys in the process of eradicating violence against women.</p> |

Source: European Pact for Gender Equality (2011-2020), https://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/lsa/119628.pdf.

According to the document, the Council recognizes that equality between women and men is a *fundamental value* of the European Union and that gender equality policies are vital for economic growth, prosperity and competitiveness.

Strategic directions in gender mainstreaming

On the global level, the new UN 2030 Agenda for Sustainable Development, adopted during the 59th UN General Assembly, contains, among the 17 global goals, the Goal 5 *Achieve gender equality and empower all women and girls*. The goal includes nine complex and multidimensional targets, namely:

1. End all forms of discrimination against all women and girls everywhere;
2. Eliminate all forms of violence against all women and girls in the public and private spheres, including trafficking and sexual and other types of exploitation;
3. Eliminate all harmful practices, such as child, early and forced marriage and female genital mutilation;
4. Recognize and value unpaid care and domestic work through the provision of public services, infrastructure and social protection policies and the promotion of shared responsibility within the household and the family as nationally appropriate;
5. Ensure women's full and effective participation and equal opportunities for leadership at all levels of decision-making in political, economic and public life;
6. Ensure universal access to sexual and reproductive health and reproductive rights as agreed in accordance with the Programme of Action of

the International Conference on Population and Development and the Beijing Platform for Action and the outcome documents of their review conferences;

7. Undertake reforms to give women equal rights to economic resources, as well as access to ownership and control over land and other forms of property, financial services, inheritance and natural resources, in accordance with national laws;
8. Enhance the use of enabling technology, in particular information and communications technology, to promote the empowerment of women;
9. Adopt and strengthen sound policies and enforceable legislation for the promotion of gender equality and the empowerment of all women and girls at all levels.

The existing experience in promoting gender mainstreaming offers a complex framework of models, tools and techniques for drafting, implementation, analysis and evaluation. The results achieved over the last two decades in promoting and enhancing gender equality on the global stage confirm that harnessing equally the potential of women and men has direct and indirect implications on the economic development, increasing social equity and ensuring the fundamental human rights.

Checklist

1. ***Define the main stages in the evolution of gender approaches in the development of the human society.***
2. ***Define gender mainstreaming.***
3. ***What is the main difference between gender mainstreaming and the previous approaches to gender equality?***
4. ***What is the main goal of the gender mainstreaming?***
5. ***Describe the complexity of gender mainstreaming through its two dimensions.***
6. ***Briefly present the results of the Beijing Platform and the priority domains for accelerating progress.***
7. ***What were the main targets and outcomes achieved as a result of promoting gender equality in the framework of the Millennium Development Goals 2000-2015?***
8. ***What is the purpose of the Global Gender Gap Index?***
9. ***What are the fundamental categories appraised by the Global Gender Gap Index?***
10. ***Present the trends recorded by the Global Gender Gap Report.***
11. ***What is the purpose of the European Union Gender Equality Index?***
12. ***What are the main evaluation domains in the Gender Equality Index?***
13. ***Present the trends recorded by the EU Gender Equality Index.***

14. **What are the main complex and multidimensional targets set by the 2030 Sustainable Development Agenda under the Goal Achieve gender equality and empower all women and girls?**
15. **What were the stages of establishing the legal and institutional framework on equal opportunities for women and men in the Republic of Moldova?**

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Topic 3. STRATEGIES AND POLICIES TO PROMOTE GENDER EQUALITY IN THE REPUBLIC OF MOLDOVA

Keywords: *mainstreaming of gender equality, gender mainstreaming, equal opportunities.*

3.1. Legal and institutional framework on gender equality in the Republic of Moldova

Promoting gender equality is a continuous process which implies constant development and monitoring. The strategic importance of ensuring gender equality in the Republic of Moldova is determined by both international commitments of the country and internal needs. By signing CEDAW (in 1994), the Beijing Declaration (1995), the UN Millennium Declaration (2000), the Republic of Moldova undertook to promote gender equality and to include gender dimension in all public policies and strategic development documents.

Before the enactment of the *Law on equal opportunities for women and men* in 2006, the legal framework for gender equality was represented by Art. 16(2) of the Constitution of the Republic of Moldova which states that “All citizens of the Republic of Moldova are equal before the law and public authorities, regardless of their race, nationality, ethnic origin, language, religion, sex, opinion, wealth and social origin”. Beside this, several normative acts contained provisions to promote gender equality, namely:

- Plan of Priority Measures to Improve the Status of Women and Enhance Their Role in Society (adopted by the Government in 1998);
- National Plan for the Promotion of Gender Equality 2003-2005, approved by Government Decision no. 218 dated 28.02.2003;
- National Action Plan in the Area of Human Rights, approved by Government Decision no. 415 dated 24.10.2003, which includes a chapter on the protection of women’s rights;
- National Action Plan for Human Rights (2004-2008), which includes a special chapter related to the equality between women and men.¹

In February 2006, the Parliament of the Republic of Moldova adopted the ***Law on equal opportunities for women and men*** (no. 5 of 09.02.2006, published in *The*

¹ Baurciulu, A.; Belostecinic, M.; Casian, A.; Pârțachi, I.; Petroia, A. Bugetare sensibilă la gen. Chisinau, ASEM, 2009, p.45-47.

Official Journal no. 47-50/200 of 24.03.2006). The aim of this act is to ensure exercise of equal rights sanctioned by the Constitution of the Republic of Moldova by women and men in the political, economic, social, cultural spheres, and to prevent and eliminate all forms of discrimination based on gender (Article 1).

The enactment of the said law marked a significant progress given that discrimination, specifically the one based on gender, was defined for the first time. In addition to defining such notions as equal opportunities, gender, discrimination based on gender, the Law establishes the legal and institutional framework in the field of gender equality.

According to the law, equal opportunities for women and men shall be ensured in the following fields:

1. public domain (Articles 6-8) by means of: equal access to public offices; electoral activity, activity of parties and other social-political organizations; equal opportunities in the media;
2. social and economic domains (Articles 9-12) by means of: equal opportunities in employment; cooperation between employers and employees and trade unions; fighting discriminatory acts of employers; equal access to entrepreneurship;
3. education and healthcare (Articles 13-14) by outlawing any form of gender-based discrimination.

As regards the institutional framework to ensure equal opportunities for women and men, it consists, according to the law (Articles 15-20), of the following authorities: the Parliament, Government; Governmental Commission for equal opportunities for women and men; Ministry of Health and Social Protection; other ministries and national administrative authorities; local public administration authorities.

Article 22 of the Law establishes conditions for the development of gender statistics. Thus, it stipulates that the National Bureau of Statistics shall collect, process and generalize statistical data disaggregated by gender. At the same time, the central and local public administration authorities, parties, other social-political organizations, legal entities and individuals engaged in entrepreneur activity shall submit to the National Bureau of Statistics the required information distributed by gender.

The Government was assigned tasks related to the launch of processes pertaining to gender mainstreaming, namely:

- a) ensure that the principle of equality between women and men is integrated into all policies, strategies, normative acts and financial investments;
- b) approve national plans and programmes related to gender equality and monitor their implementation;
- c) submit to the Parliament on a regular basis reports on the situation and activities in the field.

The enactment of the mentioned law, as well as of the National Plan for the Promotion of Gender Equality 2006-2009 resulted in more actions aimed at establishing the legal and institutional framework on gender equality, which were supported by

a number of publications by the National Bureau of Statistics and are outlined in Box 3.1.

Box 3.1.

**Establishing legal and institutional framework
in the Republic of Moldova during 2006-2012**

| Legal framework of the Republic of Moldova | Goal and significance |
|---|---|
| Government Decision no. 350 dated 07.04.2006 | Established the <i>Government Commission for Equality between Women and Men</i> |
| Law on preventing and combating violence no. 45 dated 01.03.2007 | Provides exhaustive definitions for various forms of violence, identifies the authorities and institutions in charge with the prevention and combating of violence, stipulates the competences of victim rehabilitation centres and services, and describes the mechanism for the resolution of acts of violence |
| Government Decision approving the National Programme on Ensuring Gender Equality for 2010-2015 no. 933 dated 31.12.2009 | Offers a complex approach for integrating the principle of equality between women and men in the policy papers in all areas and at all levels of decision-making. The main goal is to ensure gender equality in the economic, political and social life of women and men as a basis for the observance of fundamental human rights of all citizens. |
| Law to amend the Labour Code of the Republic of Moldova no. 168 dated 09.07.2010 | This organic law introduces the concepts of “sexual harassment”, “dignity in the workplace” and clarifies the notion of “employee” in terms of “man or woman”. Contains provisions on balancing of work and family life; excludes protectionist provisions on night shift work, and participation in business trips; provides the employer’s obligation to draft internal rules forbidding any form of discrimination and harassment; replaces the term “woman” with term “parent” in the provisions related to childcare and care for persons with disabilities, thus expanding the scope of these provisions etc. |
| Law to amend a number of legislative acts no. 167 dated 09.07.2010 | The Law improves the existing legal framework on violence (Criminal Code, Family Code, Criminal Procedure Code, Civil Procedure Code, Law on police) by introducing penalties for sexual harassment and new measures to protect the victims of domestic violence. |
| Law on ensuring equality no. 121 dated 25.05.2012 | Aims at preventing and combating discrimination and ensuring equality of all persons on the territory of the Republic of Moldova in the political, economic, social, cultural and other domains, regardless of race, colour, nationality, ethnic origin, language, religion or convictions, sex, age, disability, opinion, political affiliation and any other similar criterion. The Law provides the institutional framework for the prevention and combating of discrimination, as well as the specific competence of the public authorities. |

Source: Author based on *National report on the implementation of the Beijing Declaration, the Platform for Action (1995) and the outcomes of the 23rd special session of the General Assembly (2000), Republic of Moldova, 2014, pp. 9-11. Available at:* <http://www.unwomen.org/en/csw/csw59-2015/preparations#National>

The promotion of gender equality was done gradually and was reflected, one way or another, in the *national development strategies*, policy papers and plans, as well as in the framework of *projects supported by various international bodies*; the most important of them are presented in Box 3.2.

Box 3.2.

**Policy documents and international projects
for the promotion of gender equality
in the Republic of Moldova during 2006-2016**

| Policy documents |
|---|
| <ol style="list-style-type: none"> 1. Strategy for Economic Growth and Poverty Reduction 2004-2006; 2. Republic of Moldova – European Union Action Plan 2005–2007; 3. National Development Strategy 2008-2011; 4. Strategic Objectives of the Ministry of Social Protection, Family and Child 2008-2012. 5. Programmes in the Medium Term Expenditure Framework 2009 – 2011. 6. National Strategy for the Placement of Workforce 2007-2015. 7. National Programme for Equal Opportunities for Women and Men 2010-2015; 8. National Action Plan for Human Rights for the years 2011-2014; 9. National Decentralization Strategy and Action Plan 2012 – 2015. |
| International projects |
| <ol style="list-style-type: none"> 1. UNIFEM Project „Promoting equal rights and opportunities in Moldova by supporting gender equality legislation and strengthening its implementation mechanism” launched in May 2003. 2. UNIFEM Programme in Moldova „Promoting gender equality in the national development policies and programmes, 2006-2009”, implemented with the financial support of the Swedish International Development Cooperation Agency (SIDA) and the Austrian Development Cooperation Agency (ADC). 3. Revision of Public Expenditures 2 Project – Gender Perspective in Education and Labour Market – Initial Stage and Implementation 2007-2008, implemented with the financial support of the Swedish International Development Cooperation Agency (SIDA). 4. UN Programme “Women in Politics in Moldova”, 2014-2016, implemented by the United Nations Entity for Gender Equality and the Empowerment of Women (UN Women) and the United Nations Development Programme (UNDP), in partnership with the East-European Foundation and the Partnership Centre for Development with the financial support of the Government of Sweden. 5. Regional UN Women Programme to Promote Gender Responsive Policies, Stage 2, 2013-2016, implemented in Moldova with the financial support of the Austrian Development Cooperation Agency. |

Source: Based on the detailed information contained in: Baurciulu, A.; Belostecinic, M., Casian, A.; PARtachi, I.; Petroia, A. *Bugetarea sensibila la gen. Chisinau, ASEM, 2009, pp. 40-53.*

The analysis of the legal and institutional framework on the promotion of gender equality in the Republic of Moldova reveals that significant progress was achieved in the last 15 years. However, the existing regulations and institutional framework are not sufficient or do not immediately ensure gender equality. Thus, even today women face multiple obstacles in achieving real equality, including in regard of balancing work and family life, discrimination in the labour market and participation in the decision-making at both central and local levels.

3.2. Outcomes of promotion and progress made in ensuring gender equality in Moldova

The year of 2015 was the one, in which progress in gender mainstreaming in various sectors was to be presented, in accordance with agreements concluded by the Republic of Moldova with international bodies and fora and in accordance with the national legal and policy documents. Thus, the assessment and monitoring of progress in the Republic of Moldova can be found in the following four reports:

1. National Report on Implementation of the Beijing Declaration and Platform for Action for 1995-2015²;
2. The Millennium Development Goals Report for 2000-2015³;
3. Global Gender Gap Report for the Republic of Moldova ⁴;
4. Report on Assessing the Implementation of the National Programme on Ensuring Gender Equality for 2010-2015⁵.

The information presented in Box 3.3 shows that the areas covered in the reports are structured differently, depending on the objectives set by the conventions and/or programs for promoting gender equality. However, the indicators that underlie the analysis and monitoring of progress are determined and harmonized with those established internationally.

² National Report on Implementation of the Beijing Declaration, the Platform for Action (1995) and the outcomes of the 23rd special session of the General Assembly (2000), R. Moldova, 2014. Available at: <http://www.unwomen.org/en/csw/csw59-2015/preparations#National>

³ The Millennium Development Goals Report 2015, p. 28-31. Available at: <http://www.undp.org/content/undp/en/home/librarypage/mdg/the-millennium-development-goals-report-2015.html>

⁴ Global Gender Gap Report, Moldova, p. 260-261. <http://reports.weforum.org/global-gender-gap-report-2015/>

⁵ Raport de evaluare a implementării Programului național de asigurare a egalității de gen pe anii 2010-2015 (Report on Assessing the Implementation of the National Programme on Ensuring Gender Equality for 2010-2015). Available at: http://www.mmprf.gov.md/sites/default/files/document/attachments/raport_evaluare_pnaeg_2010-2015.pdf

Areas addressed in promoting gender equality within national and international policy documents

| Report | Areas addressed in the Report |
|---|---|
| National Report on Implementation of the Beijing Declaration and Platform for Action for 1995-2015 | <p><i>The Report is structured around 12 areas:</i></p> <ol style="list-style-type: none"> 1. Women and poverty; 2. Education and training of women; 3. Women and health; 4. Violence against women; 5. Women and armed conflict; 6. Women and the economy; 7. Women in power and decision making; 8. Institutional mechanisms; 9. Human rights of women; 10. Women and the media; 11. Women and the environment; 12. Girls' issues |
| The Millennium Development Goals Report for 2000-2015 | <p>Millennium Development Goals:</p> <p>MDG 1. Eradicate extreme poverty and hunger</p> <p>MDG 2. Ensure access to general compulsory education</p> <p>MDG 3. Promote gender equality and empower women</p> <p>MDG 4. Reduce child mortality</p> <p>MDG 5. Improve maternal health</p> <p>MDG 6. Combat HIV / AIDS, tuberculosis and other diseases</p> <p>MDG 7. Ensure environmental sustainability</p> <p>MDG 8. Develop a global partnership for development.</p> |
| Report on Assessing the Implementation of the National Programme on Ensuring Gender Equality for 2010-2015 | <p>Priority areas:</p> <ol style="list-style-type: none"> 1. Employment and labour migration; 2. Budgeting; 3. Participation in political and public decision making process; 4. Social protection and family; 5. Healthcare; 6. Education; 7. Violence and human trafficking; 8. Public awareness raising. |

| Report | Areas addressed in the Report |
|---|--|
| Global Gender Gap Report for the Republic of Moldova | <i>Fundamental categories:</i> <ol style="list-style-type: none"> 1. Economic participation and opportunity; 2. Educational attainment; 3. Health and survival, 4. Political empowerment (politics). |

Source: Developed by author based on reference reports

In the Republic of Moldova, the harmonized set of development indicators, which are gender sensitive in the context of MDGs, was developed with the conceptual support of the United Nations Development Fund for Women⁶. The harmonized set of indicators is structured according to the Millennium Development Goals and Targets set for the Republic of Moldova, including **a total 186 indicators**, grouped by areas: living standards; education; participation in public and political life; social protection; combating violence; health; environment and employment. Thus, since 2010, the National Bureau of Statistics of the Republic of Moldova provides reports in the above areas, which simplifies the evaluation and reporting work, and sets up the database for development of public policy.

In order to reflect the *overall progress* registered in the Republic of Moldova in promoting mainstreaming of gender equality, the *Global Gender Gap Index* may be followed, which analyses the difference between men and women in four fundamental categories (sub-indices): Economic participation and opportunity, Education, Health and survival and Political empowerment.

Table 3.1.

Dynamics of the Global Gender Gap Index for fundamental categories in the Republic of Moldova over the period 2006-2015

| | | Global Gender Gap Index | | ECONOMY | | EDUCATION | | HEALTH | | POLICY | |
|-------------------------------|------------------------|-------------------------|------|---------------|------|---------------|------|---------------|------|---------------|------|
| Year | Total No. of countries | Score | Rank | Score | Rank | Score | Rank | Score | Rank | Score | Rank |
| 2006 | 115 | 0,713 | 17 | 0,76 | 2 | 0,994 | 37 | 0,980 | 1 | 0,117 | 50 |
| 2012 | 135 | 0,071 | 45 | 0,761 | 21 | 0,996 | 42 | 0,979 | 34 | 0,104 | 85 |
| 2014 | 142 | 0,740 | 25 | 0,808 | 11 | 0,995 | 56 | 0,979 | 37 | 0,180 | 59 |
| 2015 | 145 | 0,742 | 26 | 0,797 | 18 | 0,996 | 50 | 0,979 | 42 | 0,195 | 58 |
| Score change 2006-2015 | | +0,029 | | +0,037 | | +0,002 | | -0,001 | | +0,077 | |

Source: *Global Gender Gap Report 2015*, p. 260-261. <http://reports.weforum.org/global-gender-gap-report-2015/>

⁶ Biroul Național de Statistică: Set armonizat de indicatori de dezvoltare sensibili la dimensiunea de gen în contextul Obiectivelor de Dezvoltare ale Mileniului. Available at: http://www.statistica.md/public/files/publicatii_electronice/Set_armoniz_indic/1_full_RO_final_publicata.pdf

The data in Table 3.1 shows growth and progress of the Republic of Moldova by category (determined on the basis of 14 different indicators that compose them) for 2006 -2015⁷. Respect for gender equality is presented by proximity to parity one of the indicator.

Also, the Republic of Moldova improved its position in recent years, ranking the 25th of 142 countries in 2014 and 26th in 2015, the best position being in the areas of education and health, where the gender gap is low, the index being close to parity 1. A favourable trend is recorded also in category Economic participation and opportunity, where the index stands at 0.8 for the last 2 years. Only in the Political empowerment category the index value is lower, although the evolution shows a 0.077 improvement of the score.

As compared to the global gender gap index determined for 145 countries in 2015, the position of the Republic of Moldova is shown in Figure 3.1.

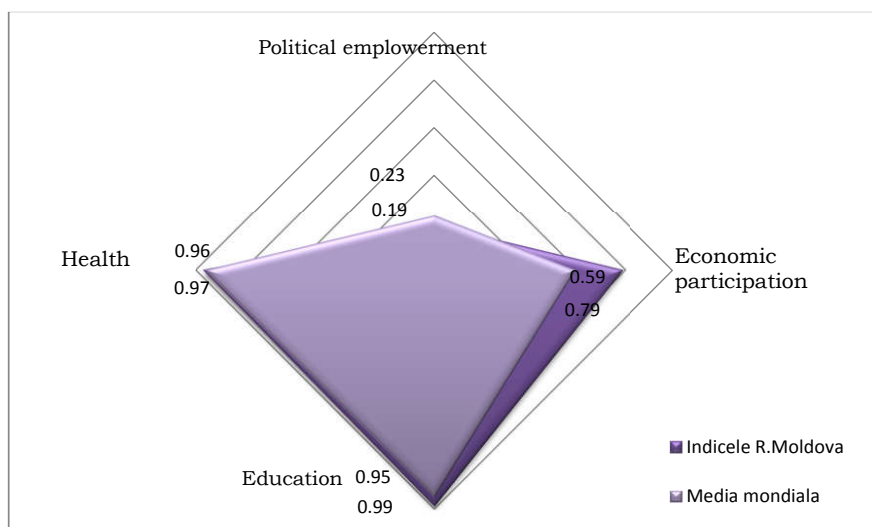


Figure 3.1. GGI of the Republic of Moldova as compared to Global GGI, 2015

Source: Developed by authors based on Global Gender Gap Report 2015. <http://www.weforum.org/reports/global-gender-gap-report-2015>

The data for a decade shows that gender differences in *Economic participation and opportunity* in 2015 was, on the global average, at 0.59, while in Moldova, the indicator is higher, at 0.79. Regarding the *Education* area, the global gender gap is small at 0.95, while for the Republic of Moldova the gap is only 0.996. *Health and survival* shows a global average of 0.957, while for the Republic of Moldova the index is closest to parity one, at 0.979. In *Political empowerment* category, the gap has remained significant over the last decade as compared to other areas and it is only 0.23 for all countries in 2015, while for the Republic of Moldova, the index is below the global average, amounting to only 0.195 and showing a slight increase of

⁷ Global Gender Gap Report 2015. Available at: <http://www.weforum.org/reports/global-gender-gap-report-2015>

0.077 as opposed to 2006⁸.

The global GGI and indicators for main categories show the situation only partially, which is comparable internationally in regards to gender disparities existing in each country. Summarizing the findings in four reports, we can highlight some areas of concern for gender equality in the Republic of Moldova in general and for mainstreaming gender equality, which are also key priorities for the immediate future:

Box 3.4.

**Problem areas in respect to gender equality
in Republic of Moldova – summary data**

| |
|--|
| <p>Political empowerment</p> <p>Members of Parliament – 21,7%;</p> <p>Ministers - 28%;</p> <p>Mayors -20.5%;</p> <p>District council members - 18.6%;</p> <p>Municipal council members - 30%.</p> |
| <p>Economic participation and opportunities</p> <p>The share of business women (co-managers and business owners) in the total number of business persons in the Republic of Moldova is 27.5%, while only 5% of them are large enterprises;</p> <p>Significant progress was registered in wages – the wages of women relative to men was 88% over the last 2 years.</p> |
| <p>Domestic violence</p> <p>About 27% of women have experienced violence from the age of 15;</p> <p>Victims of domestic violence are women (44.5%) and children (45.3%);</p> <p>The main abusers are husbands (69%);</p> <p>The prevalent forms of violence are physical violence (77.7%), corporal punishment of children (51.3%), threats (47%), threat of physical violence (45.4%) and involvement in forced contact (42.6%).</p> |
| <p>Extreme poverty</p> <p>The poverty rate among men was 16.8% and among women - 16.4% in 2013;</p> <p>The poverty rate is higher in households of single women aged over 60;</p> <p>The difference between the size of pensions for women and men.</p> |

⁸. Global Gender Gap Report 2015, p. 260-261. <http://reports.weforum.org/global-gender-gap-report-2015/>

Functionality of promotion mechanisms

- The persistence of gender stereotypes in all spheres;
- There is a solid normative legal framework, but there are weaknesses regarding its implementation;
- Lack or insufficiency of statistical data disaggregated by sex in reports on implementation of public policies and in reports on socio-economic development;
- Lack of databases and statistics disaggregated by sex in the public institutions of central and local public authorities;
- Reduced role of the Governmental Commission in promoting and coordinating national, sectorial and cross-cutting actions;
- Lack of available methods on gender mainstreaming and of a minimum set of tools (e.g. gender analysis, gender impact analysis, checklists, etc.) in all stages of development and implementation of public policies.

Implementation of gender responsive budgeting

- Lack of gender approach in budgeting and tax policies at national and local level;
- Lack of databases and statistics disaggregated by sex for gender responsive budgeting in the public institutions of central and local public authorities;
- Insufficient involvement of the Ministry of Finance in promoting gender responsive budgeting along with implementation of program budgeting;
- No analysis of the budget process in terms of gender dimension in priority areas.

Source: Developed by authors based on consulted Reports.

The key priorities for ensuring gender equality in the Republic of Moldova refer to:

- Increasing the participation of women in decision making and political activity;
- Increasing the economic empowerment of women and strengthening their financial independence;
- Preventing and combating domestic violence;
- Poverty reduction and social protection for vulnerable groups;
- Continuing efforts to ensure gender equality in national policies and programs, sectorial and cross-cutting areas;
- Harmonization of national legislation to the EC Directives of the Council of Europe;
- Implementation of gender responsive budgeting at all levels and integration into MTBF.

Achievement of gender equality is deemed to be an integral part of establishing a genuine democracy, which is conscious of and sensitive to gender dimension, with

the preliminary condition to ensure participation of all members of society, women and men in all areas of life. Reaching the goals undertaken by the Republic of Moldova in promoting gender equality is possible through gender responsive budgeting, which has a greater impact in influencing economic and social processes in society, in improving drafting of economic policies at the macroeconomic level, and in propelling implementation of equality in local authorities.

Checklist

1. **Which are the laws, policy documents, projects and programs that allowed ensuring gender equality in the Republic of Moldova?**
2. **What are the priority areas covered by the National Programme on Ensuring Gender Equality for 2010-2015?**
3. **What is the general progress made by the Republic of Moldova as measured by the global gender gap index?**
4. **Please mention the problem areas in ensuring gender equality in the Republic of Moldova at the current stage.**
5. **Which are the key priorities in ensuring gender equality in Moldova set for the near future?**

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Topic 4. ESSENCE AND CONTENTS OF DEMOGRAPHIC INTERSECTIONS OF GENDER ISSUES IN THE SOCIETY

Keywords: *gender, gender equality, gender asymmetry, gender segregation, gender order, gender revolution, gender responsiveness.*

4.1 Gender issues from the perspective of the essence, specific features and demographic trends in the Republic of Moldova

■ The concept of “*gender*” in *demography* was introduced by the D. J. Monei (1955), in “British Journal of Medical Sexology”¹. Over the last half century, the issue was of concern for demographers and demography because of the massive and multiple effects of the phenomenon.

In demography, “gender” is perceived as a demographic gap and it emerges at birth (and it is of biological and/or metaphysical nature); it manifests itself for the rest of the person’s life, including up to death. The extinction of genders (death, their disappearance from the demographic circuit is both a gender gap and a generation gap). Life expectancy and its evolution have brought about gender gaps, in association with indirect economic and social factors. Thus, gender gaps are of a biological nature (gender disparities at birth, life expectancy difference), but they are complemented by social and economic factors.

Disparities have become so broad that they affected the basic demographic processes and the sustainable existence of the livelihood framework over time, as well as the socio-economic aspect. The implications of ageing are in counter proportion to gender. The intra-generational gender is viewed in demography as a positive factor, only from the standpoint of reproduction (dominance of young and male population), where the likelihood of emergence of a new generation is high, while in inter-generational gender (domination of old age generations) the probability of reproduction is reduced to the minimum.

Thus, the ageing of the population makes for exacerbation of generational gender gaps. On the basis of gender, while at birth a slightly male dominance is noticeable (at birth the ratio is 51% boys to 49% girls or 100 girls are born annually to 106-107 boys), at adult age (at the age of 20) only a theoretical and short-term gender balance exists; afterwards, at older age, females prevail (10 women to 6-7 men aged 70, while with advancement in age, the gender gap becomes bigger). The age longevity is reached most frequently by females.

1. А. А. Ткаченко, Демографическая энциклопедия, Москва, 2013.

Normally a balance must exist between genders, but for certain reasons, disturbances of the balance appear and are present, some greater or some smaller, as relative to certain ages. Males predominate, including the in the demographics of the population of the Republic of Moldova, until the age of 19-20, the argument being that, at birth, boys predominate over girls in proportion of 51% to 49%.

At the ages 20 to 40, the balance remains theoretic, but in practice, there are differences, with small reductions from one generation to another. At the age of 40-45, females begin to slightly prevail, the predominance becoming higher at 65 and 70, with 6-7 men to 10 women. The national demographic framework is no exception, the greatest imbalance being generated by increased mortality (supra-mortality) of the male population at pre-retirement age due to high professional risk of such age categories and the effects of population aging.

The factors determining gender differences in the structure of populations are:

- *different correlation of sexes at birth* - there is a law that at birth in a population, 107-108 boys are born to 100 girls, thus males dominate. This is a purely biological law, because in each species of the animal kingdom more male individuals are born, a state being established by nature to stimulate reproduction;
- *differentiation of mortality by sex* – the male population supra-mortality leads to a gender balance until the age of 19-20 and creates a disproportion of sexes after the age of 19-20, when female populations prevails with increasing age;
- *gender differentiation of migration* – the male population has a more active migratory mobility, which creates gender misbalance between areas of origin and those of migrants' settlement, while the deepest gaps are between rural and urban areas;
- *wars and social cataclysms* – in which the male population perishes to a greater extent;
- *professional risk* – the male population opts for high risk professions, such as fire-fighters, pilots, policemen, miners;
- *different life expectancy* of male and female populations.

4.2. Evolution of gender asymmetry in the demographic structure of the population of the Republic of Moldova

The gender structure of the population of the Republic of Moldova is closer to that of the Central and Eastern Europe, being influenced by the same economic, social and political factors. The gender structure has features close to the ones recorded

in the aftermath of the Second World War, this being assessed as balanced in the census of 1939, with a 0.8% gap, considered nonessential in the demographic dimension.

The census of 1959 has recorded a maximum difference between the sexes of 7.6%. In the post-war stage, the imbalance between sexes was gradually reduced from 7.76% to 3.1%. If in 1939 the number of women exceeded that of men by 217 thousand people, in 1989 the gap decreased to 221,200 people. Over the next stage, the gender asymmetry has insignificantly decreased. In 1990, the share of women was 52.4%, while in 2006 it was 52.1%.

In the census of 2004, women constituted 51.9% of the total population, as compared to 52.3% recorded in 1989. The number of women registered in the census was 1,755,643 persons, exceeding by 128 thousand the number of men. In other words, the ratio was 1,000 females to 927 males, as compared to 912 in 1989. The census of 2014 has recorded 2,913,281 people (of which 329,108 were abroad), of them 1,410,578 were men and 1,502,703 were women. The masculinity ratio was 94 men to 100 women.

Sex structure misbalances exist also depending on the environment (urban, rural). The urban population has always less disparity between the sexes as compared to the rural population. The reason for this is migration, whereas, in cities, more men migrate for jobs, which somewhat reduces the gap. Thus, the balance in cities is achieved through offset by activity and attractiveness of greater number of jobs for men in industry, but only at a young age. The countryside is feminized throughout, with the exception of early age.

Territorially, this indicator is relatively homogeneous, with higher gaps in Development Regions South, Centre and Chisinau municipality, as well as the Northern Region, where 97 and 91 men, respectively, to 100 women are recorded.

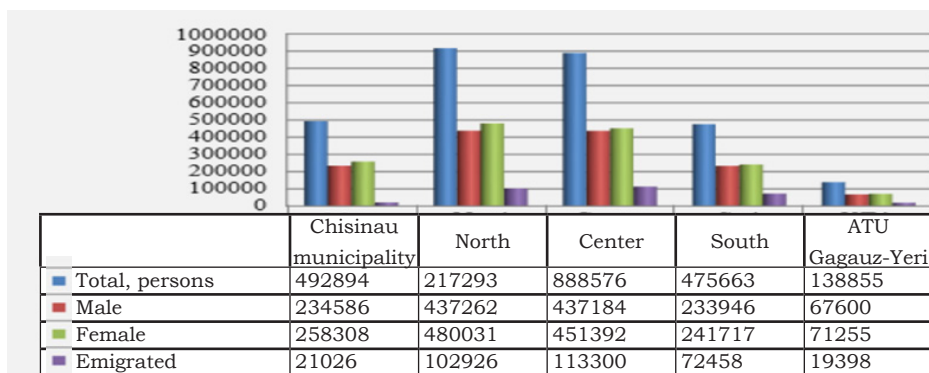


Figure 4.1. Distribution of persons by sex and development region

Source: Data of the NBS of the Republic of Moldova.

In urban areas, the masculinity ratio is higher, with 90 men to 100 women, the indicator being lower in Balti municipality and Briceni district with 84 men to 100 women.

Despite all the above-described problems, gender asymmetry is not specific for all age groups. A demographic law is noticeable that, the greater the age - the higher the women-to-men ratio. In the age group 30-34, the ratio is 1,000 men to 1,034 women, while in age group 50-54, it is 1,155 women and in the age group 70-74, 1,623 women to 1,000 men.

Misbalances are different depending on the stage; thus, in 1959 there was an obvious misbalance between males and females, of 9.6% in urban areas and of 7.2% in rural areas. Gender asymmetry is due to gradual aging, to age structure occurring in the last stage, with reduction of the number of young people from 29.8% to 21.2% and increase of the elderly population (65 and over) from 6.3% to 7.7% and to 16% (2015) as a confirmation of the demographic trend set in the second half of last century. The asymmetry in old age is increasing through life expectancy, which is higher in urban areas (usually 2-3 years older), thus female prevalence is maintained in cities through the evolution of the aging process, being equally accentuated in rural areas.

Depending on age, asymmetry is found in the demographic framework at the age of 20, due to the asymmetry of sex at birth between boys and girls, while after the age of 20, the trend is reversed. Asymmetry with growing age is determined by male super-mortality, but it increases along with older age. The asymmetry of sex in advanced age creates prerequisites for gender asymmetry in pension recipients, the rate of women in this category being dominant.

Gender asymmetry problems are of a socio-economic nature as related to the pension system:

- low salary of women;
- shorter-term contributions to retirement fund by women as accumulated throughout life;
- smaller pensions for women;
- differences in life expectancy for men and women place old age women in a difficult financial condition;
- delayed indexation, frequently underestimated pensions, including for women;
- sharp devaluation of pensions, frequently for women of older ages etc.

The number of pensioners under the sex aspect in Moldova is determined by differences in life expectancy and different retirement age. They lead, naturally, to a deep gender asymmetry in this category of generations. By the age of 62, female domination is overwhelming. At the retirement age of 62-64, the situation changes abruptly: massive retirement of men reduces the percentage of women to up to 60-61%. However, in older ages, the gap increases due to higher male mortality, women accounting to 70%. After the age of 70 this figure is higher.

The probability, that an eventual increase in the retirement age will change the essential structure of pensioners in terms of sex, is minimal. If the retirement age for women is increased (due to higher life expectancy), it will only lead to an increase of the category of women pensioners. However, if the retirement age will increase concurrently for men and women, then the structure of pensioners, in terms of gender, can become partially stable and relatively balanced. Increasing the retirement age will reduce disproportionately the financial obligations of the state to retirees, while feminization of the pensioners contributes to such reduction.

Life expectancy has **inter-generational gender implications**. The generations of the elderly were scarce until this stage. The retirement age was identified as (close to) the limit of life expectancy. Currently, internationally, 6-7 in 10 people reach retirement age, as compared to 1 in 10 in the first half of the twentieth century. In the second half of the twentieth century, generations of over 60 have grown, thus there is life expectancy at retirement and simultaneously the generations have increased numerically. There are more and more long livers and this creates asymmetry relative to the mature generations and children. The individuals in each generation have grown numerically, including the generations of the elderly over 70. The categories of long-living generations are getting closer to the age of 100; hence a deeper generational asymmetry within the three age groups.

4.3. Gender revolution and the depth of gender sensitivity

The gender revolution means changing of demographic standards, socio-cultural marriage practices and parental and tutorship standards. The gender revolution is seen as the result of the sexual revolution. It is an outcome of the destruction of the traditional division of labour, of reduced gender polarization in division of labour, not least, of broad implementation in society of the **principle of gender equality**, but also an outcome of changing the nature of children's socialization, but also of the structural change of gender roles (the feminization of men versus masculinization of women), of the elimination of the patrimonial order (in politics, economy, social life, family).²

We distinguish three stages in the gender revolution:

- 1) Gender equality enters the social institutions;
- 2) Emergence of gender disparity in relations between the family institutions and the social ones;
- 3) Organizational imbalance between institutions (family, society), declining birth rates below replacement level and increased life expectancy gap by gender criterion³.

² Кон И С «Российский гендерный порядок искусство, литература, массовая культура» Санкт Петербург, 19 November 2010.

³ Калабихина И.Е. Гендерный фактор в экономическом развитии России. М., 2009.

We should mention that, starting from the second phase, demographic effects with reproduction elements are present.

Gender equality is defined as equal access of women and men to economic resources and equivalence of 'male' and 'female' professions, equivalent roles in society, balanced appreciation of the economic (and demographic) contribution to development.

Development of gender equality is perceived as a means of development for opportunities and freedom of choice for individuals, either men, or women. The freedom of choice depends on choosing specific strategies of behaviour in activities of daily life (work, family, personal development) throughout the life stages of women or men. In egalitarian societies, the choice takes place without pressure of imposed stereotypes, without imposing the principles of gender division of labour or specialization of women and men in different areas of activity. Gender equality is a prerequisite for development, directed towards personal development of women and men, meeting the needs of individual values, without segregation by gender and age. Mothers with children, elderly solitary women are subjected, most frequently, to social-economic risks. The feminisation of poverty, the feminisation of pensioners (by different retirement age for men and women, 25% lower pensions for women) are only some general aspects of inequality.

In fact, the early retirement age of women in the Republic of Moldova allows the system to put pressure on women to leave employment. Currently, from a demographic trends perspective, there are some deficiencies regarding gender issues. Almost 93% of the lonely women over the retirement age are doomed to poor, solitary life, while 90% of the divorced are at risk of not receiving alimony for children, less than 1/3 of children receiving withheld child support and child support below the subsistence minimum, whereas children remain in custody of women given their reproductive function.

Of the total pensioners registered with the social security bodies, 66% are women. Depending on the category of pensioners, the proportion of women ranges from 72% in the case of survivor's pension beneficiaries, up to 71% for old age pensioners, up to 50% for recipients of disability pensions. About 85 thousand women and 96 thousand men are collecting pensions or disability benefits from the social security system. Every second disabled retiree is a woman.

Female poverty of reproductive age is a modern reality. The socio-economic development of the country has not dramatically changed the female poverty. Mothers with children are most often at risk of lack of income, the highest risk occurring when receiving alimony for children in case of divorce, when territorial mobility makes difficult the reception, the timely payment and the state control over the alimony.

Poverty is predominantly feminine in the Republic of Moldova. In terms of increasing the difference in income, the risk is growing for two categories of women: young women of reproduction age with children up to 3 years and older women living alone with an extremely low pension. Over 80% percent of women have income below the subsistence level. Over 40% percent of women are subjected to physical violence. Violence is changing the reproduction patterns. Women who experienced violence account for a share of 22% to 33% of the premature births.

The woman is being placed in an unequal situation due to reproduction and risks to which she is subject prior to birth and after birth, during the period of childcare, breastfeeding of the child. Women, because of their reproductive function, have a much lower salary grade. Thus, reproduction disadvantages them economically. Women with higher levels of education assure a healthy birth and childcare, but no socio-economic benefits exists for them.

Gender inequality determine the reproduction stereotypes, reproduction being below the reproduction index (replacement of generations), the reproduction stereotype being lower in women and higher in (in women it is about 1.5 - 1.7, while in men it is 1.9 - 2.0. It is believed that a sustainable reproduction is 2.2 or 2.5 children per woman, which only ensures generational replacement). The reasons for these differences is the responsibility of women for children and families and the reality of life conditions and living standards.

The reproductive behaviour is considered in terms of violence. Women who suffered from physical, sexual, psychological or economic violence show twice higher indices of pregnancy termination, either on their own accord, or due to a condition imposed by a man, or a secret abortion. Gender stereotypes and unequal gender relations are tolerated in world's societies. With the increase in the demographic age, the demand for health services is growing (especially for women due to feminization of pensioners), along with leisure demand which involves financial costs.

Within the national framework, a number of gender inequalities exist. Inequalities of a purely demographic nature refer to:

- numerical dominance of women linked to disparities in life expectancy, which is one of the largest in the world - 17-18 years;
- inequality at birth is one of the purely biological or natural laws;
- male over-mortality as correlated with the risk of their professions, as well as vices (alcohol abuse, smoking, drug use).

Even while in the Republic of Moldova, like in other former Soviet states in transition to democracy, most of the legal acts were adapted to international standards, the *establishment of a de facto gender equality is implemented in a poor manner*. Despite the fact that legislation recognizes the principle of equal opportunities for women and men in all fields, there is an uneven distribution of employed men and women in some fields (social-political, public, decision-making structures, etc.)⁴. It should be stressed that in certain stipulations and provisions there are serious inconsistencies with the principle of gender equality.

4. Daniela Terzi, EGALITATE GENDER ȘI MANDATAREA FEMEILOR, studiu pentru raportul național.

Checklist

1. **Define the demographic essences of the concepts “gender” and “sex”.**
2. **Which are the causes of the sex and gender asymmetry?**
3. **What is the age related evolution?**
4. **Define the concept of gender revolution. Name the reasons.**
5. **Specify the demographic causes of gender inequality at the national level.**

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Topic 5. GENDER STATISTICS

“Not everything that can be counted counts, and not everything that counts can be counted”

Albert Einstein

Keywords: *gender statistics, gender indicators, statistical data, gender equity index, statistical data disaggregated by sex, gender development index.*

5.1. Need for gender statistics

Gender statistics is a field of statistics, which is crosscutting for all traditional areas of statistics and it aims at identifying, producing, disseminating statistics that reflects the reality of life for women and men and the impact of policies that address gender issues. Gender statistics allows for systematic study of gender differences and gender problems.

Gender-related problems refer to ways, in which women and men are interrelated, differences in the access to and use of resources, the activities they do and the way they react to changes, interventions and policies. The analyses and assessments, which are responsive to gender statistics, are extremely necessary in order to prove the real need to engage policy makers in tackling the problems of inequality between women and men.

Disparities in social status, the different needs and opportunities of men and women in the contemporary world determine a different approach to the same problems by men and women. The gender statistics can be used to produce analyses and reports on various topics, including budgeting. Thus, the main pursued **objectives** refer to:

1. Coherent presentation of gender indicators, of principles of using these indicators in public administration, ensuring that they will later own all the instruments designed to enable them to understand the quantitative analysis in the field, the limits of applying of indicators: both quantitatively and qualitatively;
2. Presentation of gender indicators in a way that facilitates understanding. Accents are placed on the fundamental concepts, but crossing the classical barrier of theoretical basis for comparative analyses of gender inequalities (in income and consumption; access to education and employment, decision-making at local and national level);
3. Highlighting the fact that gender indicators allow for measuring the pro-

gress of society in terms that are accessible to all members of the society;

4. Developing of gender sensitive budgetary indicators, which reflect the current concerns of harmonization to international standards and, above all, to European, national standards.

The gender statistics provides quantitative information that enables analysis of differences in status between men and women, but also allow following developments in the status of men and women. According to Gender Statistics User Guide, we notice that gender statistics is not presumed only to produce statistics on women and men and it pursues more than just plain disaggregation of statistical data by sex. Production of statistics that adequately reflects the gender aspects implies that all statistics must be produced taking into account different socio-economic realities of women and men in society. This means that all statistical data (both on individuals and in areas that are not related directly to individuals) must be collected, compiled and analysed, taking into account the gender factors that affect women and men differently, which is referred to as gender mainstreaming in statistics.¹

Gender statistics *has the objective* to provide an impartial basis for comparison and assessment of progress in ensuring gender equality and empowerment of women. Simultaneously, gender statistics is necessary for scientific research, because it helps to release and test hypotheses and theory, with which one can explain development laws of relations between the sexes in society. All these types of gender statistics applications create the foundation for developing policies to ensure gender equality. Thus, gender statistics is needed to monitor and estimate the efficiency of new programs.

Those who produce gender statistics depend on the demand for new types of data that comes from users of statistical data disaggregated by sex and their needs. Users need knowledge related to gender statistics and indicators to be able to ask for statistics disaggregated by sex and to know how to use such data effectively. At the same time, working with gender statistics requires experience and competence in the field of gender equality and gender analysis. In this context, it is important to emphasize the interaction between those who produce and present gender statistics and data disaggregated by gender and potential users of such statistics.

The process of gender statistics generation is closely linked to the policy development process. The main interdependence of these processes can be described through *repetitive cycles*, which take place in real life:

1. **Highlighting the gender issue in society.** The process begins with the realization that there are gender issues in society, which require collection of extensive information.
2. **Preparation and presentation of gender statistics.** It means introducing a new toolkit for making observations in gender issues or improving existing procedures for data collection by including one or several questions in a questionnaire or survey. The questions should be neutral in terms of gender. Another possibility is to change the methodology of choice and training of interviewers, who need to understand better the

¹. Bugetele deschise publicului, p.13. <http://egalitatedegen.md/en/contribute/bugetele-deschise-publicului/>

link between the gender issue and the role of the interview.

3. **Marketing and dissemination of gender statistics.** Getting more qualitative statistical data is not sufficient. To be useful, they must reach representatives from the decision-making bodies and their advisors. They must also be available for the active actors, for instance, women's associations, which may influence decision makers to make the necessary changes. Simultaneously, they must reach those actors, which can influence the political life, but which do not recognize gender issues. For each option, special marketing strategies and certain methods of disseminating information will be required.
4. **Gender and policy analysis.** National statistical bodies are usually in charge of preparing the information, but they are excluded from its analysis for political reasons. In many countries, the national statistical bodies are forbidden to make political statements, they being required to provide only "facts". At the level of department the situation may be different, however, even here the functions of policy analysis and development of political assumptions are, usually, separate from those related to data collection.
5. **Application of gender analysis for political purposes.** This stage consists in use of analytical results in the process of development, correction and implementation of policy measures. Obviously, it would be naive to believe that implemented policies are based only on facts and figures. Various forces have influence on policy. However, existence of reliable figures and facts enhance arguments in favour of any political positions. Moreover, reliable figures and facts help in policy development based on facts, not only on assumptions and on postulates. Thus, they stimulate awareness of reasons and existing options.
6. **Changes in society.** All policy measures aim at estimating certain changes in society or preventing changes that may occur in the absence of such measures. In terms of gender, there is hope that the promoted policy will ensure equal opportunities. In some cases, these changes can occur very quickly, and in other situations - slower. For example, the policy of promoting access to education for girls in higher remunerated occupations will take effect over several years and will result in decreasing differentiation in labour remuneration.
7. **Eliminating gaps and formulating new problems / questions.** Ideally, the government should follow-up the progress of policy measures implementation in terms of specific results and their impact on society. Other actors can also monitor the effectiveness of policy measures that have a potential relationship with gender equality issues. According to obtained results, the need for additional information in some issues can be inferred, as well as starting the process anew.
8. **Preparation of new gender statistics.** In another way, the second step, described earlier, is repeated. The specific operation of the process depends on the country and the topic addressed. It is important who is responsible for gender statistics: a section of the National Bureau of Statistics

(NBS) or another operational unit, but also the extent, to which the issue will be addressed, as a gender issue, as an issue of political sensitivity or other issue. To improve gender statistics at the national level, it is absolutely necessary to have cooperation between users and providers of statistics. Users of statistics have specific needs, while statistical data providers must offer specific statistical products. This process is achieved through a dialogue between users and providers. Users must submit requirements based on their needs, while data providers must meet these needs by provision of specific statistical products. Often, however, users are not aware of the existence of certain types of statistics and/or do not know how to clearly spell out their needs. On the other hand, statistical data providers are not always sensitive and responsive to user needs or to the gender dimension in their work. Users must learn how to communicate effectively their needs and how to use statistics in their work, while data providers must understand gender issues and problems which must be reflected in the process of collection and presentation of statistical data. Only through close and continuous cooperation between these two groups of social stakeholders, comprehensive gender statistics may be produced, that meets the specific needs of users and can be understood and used by anyone.

In many UN conventions, there are numerous recommendations on the situation of women and women's discrimination. Among them, there is one strategic goal that refers to statistics. Goal 3 "Collection and dissemination of data and information disaggregated by sex for planning and estimating" includes a detailed list of measures to be performed in the field of statistics. Some measures relate directly to the general needs of statistics, "Ensuring the collection, processing, analysis and presentation of statistical data on people disaggregated by gender and age, but also ensuring coverage of issues related to the position of women and men in society." Other measures provide for meeting needs in statistics in specific areas.

Gender statistics is significant for the development of strategies, policies, programs and policy actions, which, at first glance, do not refer to gender, but, indirectly, affect some problems of relations between women and men. The existence of an empirical database helps in gender analysis and plays an important role, because without knowing the differences in operation and influence of policy on different population groups, it is impossible to predict all the consequences of the implemented policy and to resolve identified problems.

5.2. Concept of gender indicators

The indicators that take into account the gap between men and women have a specific purpose: to highlight the changes observed in the relations between women and men over time. The usefulness of these indicators is felt to the extent to which they allow to detect changes in the situation and the role of women and men in time, and therefore, assess whether gender equality has become a reality. Using indicators that take into account the gender gap will allow increasing efficiency of

activities and implementation of programmes.

Firstly, the experts have posed the task of collection and analysis of data disaggregated by sex, which subsequently allows providing grounds for the changes that have occurred because of the promoted policies. Thus, already in the 1990s, the publication *The World's Women 1970-1990* (United Nations, 1991) appeared, while the *Global Human Development Report for 1995* (UNDP) was entirely dedicated to gender issues. This report highlighted that indicators for measuring gender disparities were not some goals per se, but policy instruments that could be used for challenging the status quo established at the time in most societies, both in developed countries and in developing countries.

Back in the 1990s, the United Nations stated that the goal of the organisation was to “provide to concerned parties, both men and women, data that could be used to inform people across the globe about the enormous contribution of women in the economic, political and family life and to launch campaigns aimed at persuading the general public and governments to change policies that are unfair to women.”

Regarding developments in the use of indicators, the following may be stated: before 1970s, projects were focused more on economic growth and the development of infrastructure; hence, indicators were those related to GNP and the national accounts system.

From 1970s to the mid-1980s, the philosophy based on aid opened widely to encompass development centred on the humanitarian concept and basic needs; accordingly, numerous documents emerged which had widely used social indicators, namely, indicators related to health, education, employment and demography. The developed social indicators have come to complement the economic ones. One of the pursued aims was to find solutions for a wide range of social problems. However, over this period, the indicators used were rarely taking into account the gap between men and women.

In the mid-1980s, the accents were shifted towards empowerment and participatory indicators, including indicators that take account gaps between women and men, but still reflect turn in priorities for development. Reprioritisation and recognition of women as equal partners allowed to establish that development efforts must take into account, unequivocally, the roles assigned to each gender. Pressure from activists of feminist organizations, as well as contribution of experts from within the development organizations, has revealed the importance of data disaggregated by sex.

In 1995, under the “Next Steps” programme, the World Bank has developed a set of sectorial indicators, especially those related to population, education, agriculture, poverty, housing, of which some were considering gender gaps.

In the same year, 1995, the UNDP has expanded its activity in developing gender indicators and proposed a Gender Development Index (GDI), as well as gender-specific empowerment indicators, insisting on the differences that arise between men and women in relation to income, access to liberal professions and work in the technical, administration, management areas and access to a share of parliamentary seats to be held by women and men. The Gender Development Index (GDI) is an aggregate index that uses the same social well-being indicators as the ones in HDI

but applies a penalty on aggregate results when gender gaps exist. The greater gap between women and men – the lower the GDI of the country. The three indicators used to calculate GDI are:

1. longevity and health posed by life expectancy at birth;
2. training, indicated by the adult literacy rate, combined gross enrolment ratio in primary, secondary and higher education;
3. decent livelihoods, expressed by the real income adjusted to USD.

The gender specific HDI cannot explain the women's access to use of income, but it can reveal the possibility of women to earn income, which shows their economic independence.

The Gender Equity Index (GEI) is constituted to allow quantification of potential opportunities of men and women in the political and economic activity of the society. The first group of indicators consider the participation of women and men in economic processes. Representative indices are calculated on men and women in the governing bodies, in managerial positions, as well as specialists and technical workers.

The second index is chosen to express gender specific participation in political life and opportunities for political decision-making. In this case, the share (%) of men and women in legislative bodies is used, followed by calculation of the integrated participation index in economic and political decision-making.

Per capita income recalculated in USD is used as an indicator that shows the possibility to own and manage economic resources.

GEI, as an aggregated index, is calculated as the average of three indices: the index of representation in legislative bodies, the integrated index of participation in economic activity and decision-making, and the income index.

For many global organizations and governments, gender sensitive indicators are a major toolkit that allow assessing the degree of progress of the programs developed and implemented by them. There are many discussions about fighting for gender equality and women's rights nationally and internationally.

The achievement of the Millennium Development Goals until 2015 has largely depended on government activity. The gender sensitive assessments can reveal gaps between commitments and their implementation as well as the actual impact, which can be used to compel policy makers to respond to the action or inaction. They can also serve to measure the results of the various objectives and activities in other areas concerning relationships and gender inequalities. It is very important that these evaluations should be taken into account by policy decision makers and the measures to be taken based on them should have financial coverage, because not always a good database leads to useful actions. The decision to use or not to use gender specific data and how to use them is a political act. The public authorities must take responsibility for their dissemination, for treating them objectively; they should show political will, even in the case when the data is not favourable, because the recognition of the problem is the first step towards solving it.

In everyday practice, the effort in solving gender issues by the public authorities and the government is amplified by the support of development agencies and informal structures that deal with gender gaps.

For the process to be effective, the change must occur simultaneously at four levels: at the level of individual women and men, in society as a whole, in the formal and informal side of the activity² (14, p. 60). In “Is There Life After Gender Mainstreaming?”, A. Rao and D. Kelleher refer to gender equality in employment, as well as to any other objective related to mitigation and/or exclusion of gender gaps.

At the country level, for the administrations it is of great significance to measure and evaluate the gender situation, which allows to formulate policy actions by degree of priority; such measurement and evaluation gives the government the opportunity to know the situation of the country at a specific time and the terms, in which gaps could be reduced and the objectives and targets could be reached.

The United Nations, in its documents also insists on the need for systematic mainstreaming of gender structures in the national statistical systems starting from data collection and up to presentation of results.

In the literature on gender indicators, the notion of indicator is interpreted in many different ways. Certainly, there is a link and subordination orders between indicators and estimates. As a rule, the quantitative indicator is primary, followed by the quality indicator, and then the assessment or interpretation of the quality indicator is provided.

Quantitative indicators express a measure of the quantity, while the qualitative ones relate to the perception or opinion of individuals in respect to a phenomenon or a problem. Such a definition of the indicators in practice causes confusion of quantitative indicators with the qualitative ones and the reverse, since, frequently, there is interdependence between these indicators and calculation methodologies; thus, it is quite complicated to separate one method from the other. The distinction between them could be made based on their respective sources of information and on the manner in which the information is interpreted and used.

Most qualitative indicators come from informal studies, the results of which are presented rather in a descriptive form than as statistical analysis or as other systemic method. These indicators are complementary and are important for monitoring and evaluation activities to be efficient. For the successful use of indicators, they must have two essential characteristics: validity and reliability. A well-developed and interpreted set of indicators can play an important role in the implementation of various projects, eliminating eventual barriers.

According to international practice, the quantitative gender indicators, both national and international, especially the ones that measure social wellbeing, use two approaches:

1. In the first approach, the data are classified by gender, to assess whether the results are similar for men and women. In this case, evidence of gender gaps allows policymakers to focus their attention on sectors that require action.

² A. Rao and D. Kelleher., “Is there life after gender mainstreaming?” p.60.

2. A second approach consists in assessing the impact of gender equality on social well-being at national level (aggregate), correcting the indicators towards their decrease by applying penalties in case of gender inequality (e.g. GDI produced by UNDP). Such an approach means that gender gaps have a negative impact not only on women, but they also have a social cost manifested by a decrease in aggregate well-being.

Quantitative data are not always so objective, while appearances can generate questionable interpretations. One of the commonly encountered problems, particularly in transition economies, lies in reverse inclusion, when men and women come to find themselves in a situation much worse than before, while the data shows progress in terms of gender, income, social positioning.

In Western economies, more often, doctrines applied by policy makers are closer to the principle developed by Rawls (1972), according to which inequalities are tolerated insofar as the interests of the most disadvantaged are not neglected, or if they allow increased global production and improving the overall situation of the most disadvantaged. From these perspectives, a gap in income in a market economy is accepted. This inequality can be measured by income or expenditure concentration index (Gini coefficient); the closer the value of this coefficient to one - the more unequally is income (expense) distributed. Quantitative data cannot reflect fully the actual changes that occur in connection with changes in gender relations and here the use of qualitative indicators becomes inevitable. Among the methods used to collect qualitative data, the ones that are associated with participatory methodologies were used, such as group discussions, social mapping, surveys and interviews.

Qualitative interpretation of quantitative indicators allows for a more refined analysis, which reduces the risk of distortions in the results and the developed conclusions. Qualitative analysis serves to understand social processes: how, when and why the given situation has arisen and how can it be amended, which qualitative and quantitative indicators cannot do. Qualitative analysis is important and conclusions that are made about the evolution of phenomena are quite relevant only when taking into account all aspects of the problem.

The existence of criteria for assessing gender equality is worth mentioning. The criteria are stable guidelines against which indicators can be compared. The criteria are based on both indicators and gender statistics, while their usefulness depends on the data collection process in order to compare data at different points in time. Quantitative targets are policy aims. They describe the expected policy outcome after a certain period of time.

Statistics and gender indicators are essential elements in defining targets and monitoring progress in ensuring gender equality and the wider objectives of development of a society. In addition, recording positive results in ensuring gender equality does not only depend on the availability of gender statistics, but also the efficient use of these statistics in the formulation, monitoring and evaluation of policies, and management of results from the analysis of these statistics - namely adoption of some measures / policies for correction of gender inequalities and promoting equality.

5.3. System of gender sensitive indicators used internationally

The system of classification of gender sensitive indicators, adopted on the recommendation of the United Nations, according to priority areas determined based on the Beijing Platform for Action (1995), provides:

Formal and informal education:

- Number and percentage of literate people, by sex and age groups;
- School years completed, by level of education and sex;
- Access to specialized (technical and vocational) training programmes at secondary and higher level, by sex;
- Share in the total number of women and men of graduates in such fields as law/ science / medicine / IT;
- Gross and net enrolment rate in primary and secondary education for girls and boys;
- Gross and net enrolment rate in tertiary and university education for women and men;
- Drop-out rates at primary, secondary and tertiary levels, by sex;
- Share of teachers at primary, secondary and tertiary levels, by sex;
- Share of school principals and heads of university departments who are women and men;
- Gross birth rate is obtained by dividing the average number of women of childbearing age in the total population in one year to the number of live births in the same period.

Health, health services, nutrition

- Share of the public budget expenses allocated for women's health needs in the productive and unproductive fields;
- Number/ access to primary health centres by sex;
- Number of medical consultations and days of hospitalization, by sex; share of hospital beds in the total population;
- Share of girls and boys vaccinated against viral diseases;
- Share of births attended by health staff in total births;
- Mortality and life expectancy by sex;
- Maternal mortality rate (per 1000 live births);
- Infant mortality rate and the share of girls/boys;

- Number and/or incidence of communicable diseases of public health significance, including HIV/AIDS, by sex;
- Calorie intake as a share of the required minimum, by sex;
- Share of women's/ men's income spent on food;
- Access to sanitation and drinking water, by sex.

Economic activities and labour force participation

- Share of the female/male workforce employed in agriculture, industry and services (aged 15 years and over);
- Share of the female/male workforce employed in managerial and professional positions;
- Share of the female/male workforce who are unpaid family workers or are employed in the informal sector (aged 15 years and over);
- Employment/ inactivity rate by sex, urban/rural area;
- Time used in certain activities (including unpaid domestic work and care for children and/or elderly);
- Incidence of working time (full time/ part time) for women and men;
- The right to maternity leave/ number of weeks / share of women who enjoy this right;
- The right to parental leave/ number of weeks / share of women and men who enjoy this right;
- Share of loans and financial and technical support available from governmental and non-governmental resources provided to women and men;
- Differences in wages/income between women and men by occupations and fields of activity;
- The situation of childcare services and share of children aged 0-3 years and 3-6 years who receive care.

Access to property, equipment and loans

- Share and distribution of properties (land, housing, livestock) by sex and income groups;
- Share of women who have access to loans, compared to men;
- Share of rural households, by sex of household head;
- Share of households without land ownership, by sex of household head;
- Average income of agricultural workers, by sex;
- Share of women and men who received land titles through ownership reform schemes.

Legal rights and political power

- Share of seats in the national parliament and local government/ decision-making bodies held by women and men;
- Share of women and men in decision-making positions in the Government;
- Share of women and men on electoral lists of political parties;
- Share of women in public administration at the highest departmental level;
- Share of women employed in the public sector, at administrative and managerial level;
- Share of women and men registered as voters / Share of women/men who vote;
- Share of women in decision-making positions at the high/medium level in trade unions and employers' organizations;
- Share of female judges, prosecutors and lawyers in the total;
- Share of women in police and army, by ranks.

Violence against women

- Number of reported cases of domestic violence;
- Number of reported cases of sexual assault and rape;
- Number of reported cases of sexual harassment;
- Rate of conviction of those accused of violent behaviour against women;
- Number of immediate protection measures to assist abused women (legal aid, financial assistance, psychological assistance, shelters, police intervention, actions by NGOs);
- Increases/decreased number of acts of violence against women during armed conflicts.

Macroeconomic policies and gender

- Private consumption expenditure in households by sex of household head;
- Public budget expenditures, total and as a share of GDP;
- Public budget expenditures, by sector;
- Share of persons at risk benefiting from different social security/assistance schemes, by sex and household size;
- Share of people potentially eligible to receive social insurance/assistance and similar benefits, by sex and household size.

5.4. Harmonized set of gender sensitive development indicators in Moldova

The report on the review of the harmonized set of gender sensitive development indicators outlines the evaluation results in terms of compliance with the principles of accuracy, reliability, coverage, timeliness, frequency, relevance, comparability and accessibility, achieved through the statistical data collection exercise on the basis of the harmonized set of gender sensitive development indicators.

In order to monitor policies and actions implemented to promote equal opportunities, and to evaluate the results of their implementation, a harmonized set of gender sensitive development indicators was developed, which is connected to the priorities of the National Programme on Ensuring Gender Equality for 2010-2015 (PNAEG).

The document includes sets of relevant primary and secondary statistical indicators, divided according to the eight areas of PNAEG, their descriptions (definitions, data sources, frequency of producing indicators, regulatory framework), instructions for use and interpretation of primary indicators and correlation with other indicators.

The harmonized set of gender sensitive development indicators, revised in 2016 provides a classification of indicators according to the eight areas of PNAEG, as follows:

1. *Employment and labour migration.* This area is represented in the harmonized set of gender sensitive development indicators by a group of indicators made of 5 primary and 24 secondary indicators, while the data will be collected from the following five data providers, NBS, NEA, ODIMM (Ministry of Economy), State Registration Chamber, Ministry of Justice, MLSPF. This specific set of indicators covers 29 indicators, including 5 primary and 24 secondary indicators. Primary indicators are as follows:

1. employment by economic fields, ownership forms, employment status, sex and areas;
2. people who left the country for work or to look for work, by sex and age;
3. unemployment rate by sex and level of education, age groups;
4. business owners by sex, area, and economic activities.

Among the 24 secondary indicators, some new indicators have emerged, which reflect the reality of the labour market in Moldova and will enable a better assessment of the situation in this area:

- Breakdown of farm areas by sex of farm owners;
- Number of women/men who received advice on migrant's reintegration upon return;
- Distribution of women/men who received advice on migrant's reintegration

upon return;

- Number of women/men, including returned migrants, employed as a result of active labour market measures;
- Distribution of women/men, including returned migrants, employed as a result of active labour market measures;
- Number of SMEs created with the support of programmes managed by ODIMM;
- Number of people who attended entrepreneurship training courses as part of programmes managed by ODIMM.

2. Budgeting. Indicators are part of the set of indicators for the assessment of the situation on ensuring equal opportunities for men and women in the budgetary sector and were disaggregated in absolute and relative indicators, which resulted in four fully feasible indicators. All the data will be provided by the Ministry of Finance. Indicators were presented as requested. In this area, the following indicators will be calculated:

1. *Share of expenses by administrative/law enforcement areas* (for heads in CPAs/LPAs, defence, public order, security areas) where the share of men is usually higher, at the level of:
 - a.) state budget;
 - b.) budgets of the administrative-territorial units.
2. *Share of expenses for social sectors* (education, healthcare, social protection, public services), as areas relating primarily to the interests of women and children, by 3 levels:
 - a) state budget;
 - b) state social insurance budget;
 - c) budgets of the administrative-territorial units.

3. Social protection and family. This area covers 21 indicators, of which 6 primary and 15 secondary indicators. 10 institutions were identified as data providers. It should be noted that two or more sources were identified for some indicators. To ensure a proper understanding, data will be disaggregated by relevant agencies. The primary indicators are as follows:

1. share of pensioners in total population, by sex, area, and category;
2. share of male/female tutors/caregivers (by areas, age groups, fit for work/pensioners) a) to children; b) to the disabled;
3. average monthly pension by sex, area and category;
4. share of mothers/fathers receiving child-raising benefits (by area, age, insured/uninsured);
5. share of men/women receiving allowances for uninsured per-

sons (by area, age groups);

6. ratio of places in pre-school institutions to the total number of pre-school age (3-6 years) children, by area

The new indicators that were included in the harmonized set refer to the following:

- Number of beneficiaries of services from social centres by sex and type of service;
- Number of beneficiaries of social care at home;
- Monthly average number of beneficiaries of social canteens.

Indicators will be estimated in absolute and relative values.

4. Women's participation in political and public decision-making process. The list of indicators on women's participation in political and public decision-making process includes 19 indicators, of which 5 primary and 14 secondary indicators. 11 agencies, as well as all the gender units in the CPAs, were identified as potential and actual data providers. The primary indicators are as follows:

1. Share of women in the number of civil servants in central public authorities, by categories;
2. Number/share of women and men elected in municipal and local councils (mayors, deputy-mayors, presidents and deputy-presidents of raion councils; raion, municipal and local councillors) by area:
 - Number/share of women and men elected in local councils (mayors, 1st and 2nd level local councillors),
 - Share of women elected as mayors, deputy-mayors, presidents and deputy-presidents of raion councils;
3. Number/share of female entrepreneurs.

Secondary indicators are as follows:

- Number of women in total number of civil servants in local public authorities;
- Availability of affirmative action to promote women's participation in political and public decision-making;
- Share of women in the diplomatic corps of the Republic of Moldova, by category;
- Number of women and men who turned up to vote and received ballots in the total number of voters (in local and parliamentary elections);
- Share of women and men in the total number of registered candidates (in local and parliamentary elections);
- Number of women and men working in: the justice sector (judges, magistrates, lawyers, prosecutors) and the law enforcement sector (police, border guards,

civil protection);

- Number/share of women involved in civil society activities;
- Share of female members of political parties and central governing bodies;
- Number of women and men who are members of boards of large companies;
- Ratio of time for domestic work to the time for public life (women/men);
- Expenses for decision-making positions etc.

Based on these indicators, a number of derived indicators will be calculated.

5. Healthcare. This area from the harmonized set of gender sensitive development indicators is represented by a total number of 39 indicators, including 5 primary and 34 secondary indicators. Data providers are the NBS and the National Centre for Health Management, NCPH and LPA will provide data for one indicator each. A number of changes were made to the names of indicators and their disaggregation, in consultation with data providers, depending on data availability. Many secondary indicators are not available, and they were not presented during the exercise, although they were assigned the first priority (can be calculated based on available data) in the harmonized set of gender sensitive development indicators. Primary indicators refer to:

1. population morbidity rate by sex, types of disease, area: in children and adults (disaggregated by five general indicators and by diseases);
2. abortion rate by age and area;
3. maternal death rate, by causes of death, area and age groups.

Among secondary indicators, the following should be noted:

- Proportion of 2 years-old children immunized against measles by sex and area;
- Share of medical staff, by sex and category;
- AIDS mortality rate, by sex, age group and area;
- Incidence of recorded HIV cases, by age (including 15-24 year-old people), by sex and area;
- TB mortality rate, by sex, age group and area;
- Infant mortality rate at home, by sex and area;
- Rate of alcohol abusers, by sex, area and age group;
- Number of healthcare personnel trained on gender issues in healthcare;
- Share of resources allocated from the state budget for the healthcare of pregnant women and children in total health expenditure etc.

6. Education. In the above-mentioned set of indicators, this area is represented by a total number of 26 indicators, including 5 primary and 21 secondary indicators. NBS is the main data provider and only three indicators were provided by

the Ministry of Education. This area is well covered with data, according to the required disaggregation, including gender:

1. Rate of enrolment in the education system of girls and boys aged 3-6 years;
2. Share of W/M pursuing specialized secondary and higher education, by sex and fields;
3. Share of women and men in the total teaching staff by education levels: pre-school, primary, general secondary, specialized secondary, secondary vocational, higher

Secondary indicators refer, inter alia, to:

- Gross enrolment rate in preschool education, primary education, secondary education of girls and boys, by area;
- Number/share of boys/men who study fields traditionally dominated by girls/women;
- Number/share of girls/boys with special needs enrolled in general schools;
- Number/share of female researchers, with and without scientific degree;
- Rate of enrolment in education of girls and boys, by age;
- Share of girls and boys enrolled in the first grade who were enrolled in pre-school education programmes;
- Dropout rate of girls and boys: a) primary level (grades 1-4), b) secondary level (grades 5-9);
- Presence of gender-related topics/modules in the curricula for all levels of education and in the curricula of continuing training courses for teachers in pre-university education institutions;
- Number/share of women in the total number of managers of preschool, primary, secondary, specialized secondary, vocational, and higher education institutions etc.

7. Violence and trafficking in human beings

This area covers a total number of 21 indicators, including 4 primary and 17 secondary indicators. 14 agencies were identified as data providers, among which the 1st and 2nd level LPAs that own information relating to the indicators included in this area. The biggest challenges are that data are not generally available for many indicators and for others it is not disaggregated by sex, which makes indicators irrelevant and useless for the analysis of situation in this field from a gender perspective. Primary indicators include:

number of registered cases of domestic violence by main types of violence (data disaggregated by area, sex);

number of registered cases of trafficking in human beings (data disaggregated by area, sex, age (children, adults));

number of criminal cases of DV and THB filed to court and sentences delivered (convicted, acquitted);

number of victims of DV and THB who benefited from services provided by assistance centres, by sex, area, age.

Secondary indicators cover the following:

- Number of places available in the shelters for victims of domestic violence and trafficking in human beings;
- Share of domestic violence in the total number of acts of violence/crime;
- Share of people who suffered from domestic violence (data disaggregated by sex, marital status, age, education, socio-economic status, area);
- Share of persons who were victims of domestic violence and received primary and qualified legal aid;
- Number of hours for domestic violence lessons in the school curriculum;
- Number of employees of the CPAs and LPAs and law enforcement authorities trained in preventing and combating domestic violence and trafficking in human beings (addressed from the gender perspective);
- Proportion of state/local budget allocated to prevent and combat domestic violence.

8. Public awareness raising. The area of public awareness raising includes four indicators and there is only one data source, the Audio-Visual Coordination Council. The relevant indicators are as follows:

1. number of media organizations that adopted a Gender Sensitive Code of Conduct or similar norms;
2. share of positive images in the media of women holding public positions, by categories;
3. number of sexist images in the media;
4. number of women using remedy procedures in cases of violations of their rights in the media at national and international level.

To ensure a proper and full understanding of indicators, as well as other characteristics needed to ensure their usefulness and use, the collection of metadata for indicators included in the harmonized set of gender sensitive development indicators was initiated. Metadata are as follows:

(1) The name of indicator from the set of PNAEG indicators in the wording that was used in that set;

(2) The level of disaggregation of the indicator, in order to determine the available and feasible disaggregations for each of the indicators, in addition to disaggregation

by sex;

(3) Data measurement unit, expressed in absolute/relative values, which is critical to ensure a proper analysis of data;

(4) The frequency of data collection by the organization/institution concerned in order to understand whether the indicator is collected with a certain frequency and whether the situation can be assessed over time;

(5) The deadline for submission/dissemination, i.e. the time limit when the information is available to users/beneficiaries, which will allow the data users to request and to use the indicator in a reasonable time;

(6) Source of primary data for the calculation of the indicator, which entails the specification of special forms, databases, regular surveys etc.

(7) Definition of the indicator in accordance with regulations for the official meta-data (if available);

(8) The formula used for calculation, which is the arithmetic expression for the calculation of the indicator, particularly required when calculating the shares, to provide the accurate analytical expression and ensure the understanding of the situation relating to the described area;

(9) The method of data dissemination, specifying the source where data can be retrieved, if data is public, to ensure a timely access to data;

(10) The responsible unit, including the name of the department, directorate, division, unit within the organization/institution, which is responsible for the provision of the indicator.

Checklist

- 1. What is the need for gender statistics?**
- 2. Please explain the purpose of monitoring changes in the situation of men and women through gender statistics.**
- 3. What are the main objectives of gender statistics?**
- 4. Name the repetitive cycles of the preparatory process of gender statistics.**
- 5. What is the specific purpose of indicators that take into account the gap between men and women?**
- 6. What are “gender sensitive indicators”? Give some examples.**
- 7. How is the gender development index calculated, taking into account the gender? Please provide the interpretation of this indicator.**
- 8. What constituent information is contained in the gender equity index?**
- 9. What approaches are used to measure social well-being through quanti-**

tative indicators of gender, according to international and national practice?

- 10. What are the main requirements of international organizations to national gender statistics? To which extent, are these requirements met in the Republic of Moldova?**
- 11. What is the purpose of developing a harmonized set of gender sensitive development indicators?**
- 12. Name the areas covered by the harmonized set of gender sensitive development indicators.**
- 13. Please specify the relevant primary and secondary indicators for each area.**

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Topic 6. GENDER ANALYSIS – THEORETICAL AND METHODOLOGICAL ISSUES

Keywords: *gender analysis, quantitative methods, qualitative methods, Gender Analysis Matrix, the Harvard Analytical Framework.*

6.1. The need and aim of gender analysis, its participants and beneficiaries

▀ The capacity to integrate gender into the State strategies and policies, by mainstreaming gender responsive budgeting is closely related to the quality of gender analysis. This in turn is determined by the understanding of the need and impact of gender analysis on budgeting process, the obligation, regularity and responsibility applied at all levels of public administration and, last but not least, the quality and completeness of gender-disaggregated budget data and statistics.

Gender analysis is an essential element of the socio-economic analysis. The multilateral/ comprehensive socio-economic analysis must also assess gender relations, gender being a significant factor in all social and economic relations. The analysis of gender relations provide information to the society and authorities on women's different conditions compared to the men's, and the effects the policies and programmes may have on them because of different initial situation. Such information may improve policies and strategies. It is essential to make sure that different needs of women and men are met.¹

The analysis of socio-economic relations and gender relations is an integral part of the macroeconomic policy analysis, and is essential in developing and implementing efficient and effective cooperation initiatives – current and strategic development.

¹ CIDA's Policy on Gender Equality; Canadian International Development Agency; Available at: http://www.sice.oas.org/Genderandtrade/CIDA_GENDER-E_Policies.pdf

Pioneering in analysing budgets from gender perspective

The Government of Australia is the one which began drafting the state budget in the light of financing “for women” as an integral part of the state budget in the mid-80s. Sharp R. and Broomhill R. examined the entire state budget in terms of its impact on women in Australia. Their study showed the following:

- The role of women at different decision-making stages is limited;
- The objectives and contents of financed measures are “gender blind”;
- Only a small part of resources is directed to finance actions addressing in particular women.

The political changes in the mid-90s led to the suspension of this practice at the federal level. However, some states have continued to perform the gender budget analysis individually. In this way, the South Australia state budget for 2000/2001 had nine pages of annexes which outlined the assumed impact of the budget on women. The Australian budget’s focus on gender dimension was promoted by the gender equality advocates within the Government, called “feminist bureaucrats”, and had three objectives:

- To raise the awareness within the Government on the gender impact on the budget and on the financing of the policies;
- To make governments accountable for fulfilling their gender equality obligations;
- To make changes in the budgeting and financing of policies, to improve the socio-economic status of women.

The analysis of women’s and men’s different situations can show the perception of the different impact laws, traditions, policies and programmes may have on women and men. At the same time, gender analysis supplies information on women’s and men’s access to resources and control over them, to draw attention to the disparities which can cause systemic inequalities. The information gathered during the analysis must outline in a visible and explicit manner the differences between women and men (using gender-disaggregated data) to enable the policies/programmes/projects propose effective actions to promote equality. Gender analysis can also provide information on how gender equality can be promoted through joint efforts, to ensure sustainable development and maximum efficiency in the achievement of the society’s development objectives.

Thus, in a study carried out by Australian Red Cross,² gender analysis is considered “a process which assesses the impact a development policy, programme, project or other activity may have on women, men, boys and girls, and the economic and social relations between them, as a kind of social analysis that should be integrated into poverty analysis”.

² Gender Capacity Building Tool Pilot Version, 27 September 2010, Australian Red Cross.

In an updated sense, gender analysis is a process of collecting and analysing gender-disaggregated information to understand gender differences. Gender analysis explores gender differences within policies, programs and projects; thus different needs of men and women can be identified and met. It also facilitates the strategic use of women's and men's distinct knowledge and competences (Lis Lindsey Meyers and Jones, 2012).³ An appropriate vision of gender focuses on the causes of the current division of responsibilities and benefits, and its effects on the distribution of rewards and incentives in society.

A gender analysis thus addresses the links of gender with factors such as race, ethnic origin, culture, social class, age, disability, and/or other status, among others, and is required for all policies, programmes and projects. Gender analysis is carried out throughout planning, implementation, monitoring and evaluation of results. Through a fundamental examination of tasks at each stage of the process, the relationship between the social context and economic factors which have an impact on women can be determined, as well as the actions that respond to their needs.

At the grassroots level, the gender analysis makes visible the varied role women, men, girls and boys have in the family and in the community. If the economic policy has no gender analysis, it can lead to the exclusion of women's perspectives and priorities within the development strategies at national and local level.

In general terms, the gender analysis:

- is an intrinsic dimension of the socio-economic analysis;
- looks at differences in the women's and men's lives, including those resulting in economic and social inequalities, and integrating the results in the promoted policies and strategies;
- shows that policies and their implementation cannot be gender-neutral in a society based on gender performance;
- tends to highlight the positive changes for women/men;
- is based on specific analysis tools and techniques.

Gender analysis highlights the following aspects:

- The life of women and men and, consequently, their experiences, needs, achievements and priorities are different;
- The lives of women are not identical, their interests can be determined both by their social status or ethnic identity and the fact that they are women;
- Experiences, needs, successes and priorities vary depending on age, ethnicity, disability, income levels, employment status, marital status, sexual orientation;
- It is necessary to develop different strategies not only for women and men, but also for different categories of women.

³. GENDER Analysis, Assessment and Audit. Manual & Toolkit, Developed by Lis Meyers, independent consultant and Lindsey Jones, ACDI/VOCA.

Therefore, *gender analysis*⁴ refers to a variety of methods used for understanding relationships/relations between men and women, their access to resources, their activities and the constraints they face within relationships. Gender analysis provides information which confirms that gender and relations of race, ethnicity, culture, tradition, social class, age, disability and/or other status are important to understand different models/schemes/methods of involvement, behaviour and activities women and men have in various structures and areas - economic, social, political and legal ones.

The authors of the *Canadian Gender and Poverty Project. Gender Analysis Tools*⁵ approach *gender analysis* as a tool for evaluating differences in women's and men's roles, different levels of power they hold, their different needs, constraints and opportunities, and the impact of these differences on their lives.

Finally, there are multiple attempts to define what gender analysis of women's and men's roles is, the most far-reaching remains that⁶ proposed by Candida March, Ines Smyth and Maitrayee Mukhopadhyay (1999): "This analysis explores and highlights the relations of women and men in society, and inequalities in these relations, clarifying: Who does what? Who has what? Who decides? How? Who wins? Who loses? When we ask these questions we will also ask: What men? What women? Gender analysis eliminates the gap between the private sphere (that involves personal relationships) and public sphere (which deals with relations in the whole society), analysing how power relations in a household interrelate with those at the state, community, market and international level."

Gender analysis should not only describe the current gender situation, but also highlight the causes and effects of gender disparities on the target population.

Gender analysis provides the basis for a fundamental analysis of the differences between women's and men's lives, and it changes the probability that the analysis will be based on incorrect assumptions and stereotypes. Looking at the reasons behind inequalities and discrimination, the analysis helps set relevant and specific objectives for their resolution and determining the activities that can help eliminate such inequalities. At the same time, gender analysis aims at ensuring equity more than equality.

When setting up a project, an essential first stage is to ensure that it meets the requirements for gender equality and tackles the gender considerations addressed by it. Gender analysis helps to understand various models of participation, involvement, behaviour and activities women and men, in their diversity, have in the economic, social and legal set-ups, as well as the implications of such differences. Gender analysis highlights who has access, who has the control and who, most likely, will benefit from the new initiative/project, and who, most likely, will lose.

Gender analysis answers how gender perspective should be addressed throughout

⁴. CIDA's Policy on Gender Equality; Canadian International Development Agency; http://www.sice.oas.org/Genderandtrade/CIDA_GENDER-E_Policies.pdf

⁵. Toby Goldberg Leong, Catherine Lang, Marina Biasutti, Gender And Poverty Project. Gender Analysis Tools.

⁶. Candida March, Ines Smyth, and Maitrayee Mukhopadhyay, A guide to gender – analysis framework, 1999, <https://www.ndi.org/files/Guide%20to%20Gender%20Analysis%20Frameworks.pdf>

the process/project, especially with regard to *identification* of relevant objectives and indicators on gender equality, *planning and implementation* of concrete actions to achieve the objectives, and *monitoring and evaluation* of outcomes.⁷

Box 6.2

Core Principles of Gender Studies

| | |
|---------------------------------|---|
| A participatory activity | The study should involve stakeholders: clients, staff, donors and other project participants, who should have the opportunity to share their experiences, perceptions and beliefs. |
| A means, not an end | All types of studies include recommendations on how to better include and address gender considerations in future or existing processes/activities. Findings and recommendations should result in action and improvement. |
| Not a one-off event | The three different types of gender studies should be fully integrated throughout project cycles. |

Source: *GENDER Analysis, Assessment and Audit. Manual & Toolkit, Developed by Lis Meyers, independent consultant and Lindsey Jones, ACDI/VOCA.*

Ideally, gender analysis should be included at all stages of the project life-cycle. Until all employees will be able to do so in a consistent and integrated manner, distinct gender studies can be performed: gender analysis, gender impact assessment or a gender audit.

Gender analysis considers the developments in gender relations in a project/programme/institution. The findings and recommendations provided to workers through a gender analysis help them understand the roles, relations, constraints and opportunities addressed through gender. They then use this information to design an activity to streamline it.

Gender impact assessment is a review from a gender perspective of a project or activity currently or recently completed. It assesses how a project is focused on and/or is aware of gender inequalities within a policy and at the implementation level. The evaluation highlights the successes and shortcomings in planning, identification of new opportunities for improving strategic planning. This often includes gender analysis aspects which require an understanding of gender inequality within a certain framework.

Gender audit evaluates how gender considerations are integrated into the programs and policies of an organisation, department or office. Having a wide scope, the audit evaluates gender approaches and policies, staff capacity, tools and resources, the level of gender mainstreaming into programmes and projects, organisational culture and issues at the workplace. In general, gender audit monitors the progress made in gender mainstreaming and identifies both the successes and gaps.

The table below describes the differences between the three gender studies, determined by Lis Meyers and Lindsey Jones⁸, noting that: “it is important to remember

⁷. <http://eige.europa.eu/gender-mainstreaming/tools-and-methods/gender-analysis>

⁸. ACDI/VOCA, „Gender Analyses, Assessments, and Audits Brief”, Washington D.C.: ACDI/VOCA (2012).

that the types of Gender Studies used are alternatives, and some agencies and institutions make no distinction between gender analysis, gender assessment or audit, as they often overlap.”

Table 6.1

Differences in gender studies

| Gender Analysis | Gender Impact Assessment | Gender Audit |
|--|--|--|
| <ul style="list-style-type: none"> • Conducted during programme design or planning • Analyses the gender context in which the programme is operating • Helps understand gender roles, responsibilities, statuses and inequalities so they can be use as information to design, implement, monitor and evaluate programmes • Conducted via: desk review of disaggregated data and on-site data analysis, and interviews with beneficiaries and other stakeholders • Includes recommendations on how to integrate gender considerations into the programmed activities | <ul style="list-style-type: none"> • Conducted during project implementation or as part of the final evaluation • Assesses the programme/project (both technical and institutional processes and results) • Assesses the extent to which the programme integrates gender issues into activities and institutional systems • Assesses the programme results and effects on male and female participants • Conducted via similar research processes as gender analysis, but includes a more comprehensive review of existing activities and initiatives • Includes recommendations and lessons learned • Can include components of a gender analysis, particularly if one has not already been done | <p>Conducted during project implementation</p> <p>Assesses the internal and external context</p> <p>Evaluates gender integration into: policies, staff capacity, tools, training and resources, organisational culture and workplace disputes</p> <p>Conducted via: desk review and summaries of data, questionnaire, and interviews and focus groups with staff. Should ideally be carried out by an external consultant.</p> <p>Makes recommendations about how to better mainstream gender within organisation and among staff</p> <p>Can include components of a gender assessment to assess effects of programming on beneficiaries</p> |

Source: ACDI/VOCA, “Gender Analyses, Assessments, and Audits Brief”, Washington D.C.: ACDI/VOCA (2012).

Who carries out the gender analysis? The burden rests with analysts, including those from academia; policymakers - officials from the CPA and LPA; programme/project managers; civil society and others to work in partnership with women and

men in promoting gender equality. Such a *participatory process* provides for a favourable context for creating, implementing and evaluating initiatives/projects for gender equality promotion. In addition, gender analysis should identify local and national initiatives undertaken by both the Government and civil society to strengthen and complement efforts towards mainstreaming gender into national and local policies and strategies.

What skills are needed to carry out a gender analysis? First, the knowledge of gender analysis principles/techniques and tools, (ii) skills for selecting the most appropriate framework/matrix with high yield of solving gender-aware situations, (iii) skills of quantitative and qualitative interpretation of disaggregated data and, not least, skills formulating strategic decisions.

Box 6.3

BENEFITS OF GENDER ANALYSIS

| | |
|--------------------------|---|
| Identification | Gender analysis identifies and fosters understanding of women and girls as clients/customers of services provided by government departments and agencies. |
| | Evidence gathered by gender analysis provides arguments on the relevance to and the impact on women and girls of policies, programmes and services. |
| Efficiency | Gender analysis tools enable the improvement of predictability, and, as a result, minimise unintended consequences of policies/programmes. |
| Action | Gender analysis provides tools to understand clients' needs and make effective and equitable decisions. |
| Engagement | Gender analysis engages women and girls in setting relevant and realistic directions of development. |
| Systemic approach | Gender analysis has a systemic approach that enhances planning, implementing, monitoring, evaluating and reporting in a project cycle. |
| Innovation | Gender analysis challenges old ways of thinking and prompts new responses. |
| Quality of life | Gender analysis ultimately improves the quality of life of women and girls and advances their engagement in the community life. |

Source: Gender Analysis Toolkit, Office for Women, Queensland Government, Canada, 2009.

The benefits derived from the application of gender analysis are embodied in the systematic reporting of central and local public administration authorities and, consequently, in keeping constantly an eye on the fulfilment of the CEDAW provisions and the Beijing Platform reflected in the national legislation on gender equality; increasing the efficiency of public spending through nominal, strictly targeted distribution of public financial resources for purposes that will provide more benefits to the recipient and, therefore, will be more effectively used; increasing transpa-

rency in public funds management, and reducing the corruption; persistent and conscious participation of women in the implementation of public policies and in particular in their planning and budgeting.

6.2. Gender analysis methodology: frameworks, objectives and stages

We believe the following elements are important for carrying out a gender analysis:

- Qualified staff;
- Adequate (informational, financial, material) resources;
- Use of the local experience.

Obviously, the quality of gender analysis depends, first of all, on the qualifications of the staff involved in its realisation. A specialist employed to conduct gender analysis needs to have the knowledge and skills related to different fields, in particular, they need to have knowledge of the current legislation, the provisions of plans and development strategies at national level and particularly on gender, social policy and, and solid knowledge in public finance and sociological analysis.

A gender analysis begins with the collection of (statistical, financial, etc.) information for a better understanding and perception of gender roles and relations in the specific context subject to research.

When conducting a gender analysis, it is important to distinguish between **gender-disaggregated statistics** showing only the number of men and women as a share in a certain population, and **gender statistics** that can reveal the relationships between women and men, underpinned by numbers. **Gender statistics** may indicate the need for policy interventions, but not the type of intervention that should occur. Gender statistics provide concrete information on the status of women, for example, any change in their status over time.

Gender-aware indicators provide direct evidence of the status of women in relation to some standard norms or in accordance with a reference group.

The men from the same country constitute the reference norm in this case, but in other cases it could also be other groups of women, such as women from another country or those belonging to different age groups.

Gender-related social indicators are among the key means by which planners and policy makers measure gender inequality. Programme indicators show progress towards a target or policy priority of gender equality. They also provide information based on which gender specialists advocate for policies that could lead to greater gender equality.

Subsequently, when the research is completed, one will find whether gender division of labour is questioned or not, which are the tasks, responsibilities and current opportunities following the gender principle. Who is the expected recipient of a pro-

posed policy, program or project benefits, and who is the loser? Both parties, men and women, should be consulted about the results, and both have the opportunity to contribute to the solution formulation. At the same time, it is important to take into account the long-term impact of policies, programs and projects on the equality between women and men.

Persons, specific social groups and communities where initiatives/projects are implemented should be engaged at the beginning of their implementation, which would allow for determining the gender impact on project beneficiaries. Without being informed and without using the local expertise, one will find it difficult to understand the points that are unclear with respect to gender roles and social relations.

There are lots of gender analysis tools (Gender framework; gender matrix; gender proofing or 3R, 4R, 6R Methods, etc.). Although the tools are not identical, they are based on stage-by-stage approach, following similar processes by providing questionnaires with questions that are applicable. The choice of methods for answering those questions is not predetermined.

A variety of methods can be applied to achieve the objectives of each stage. However, there are two main categories of methods for gender equality mainstreaming in policies/programs/projects: quantitative and qualitative. The differences between them refer exactly to the type of information and knowledge each of them generates:

- The quantitative economic research methods use measurable values. The first condition of quantification is to use accurate and updated primary and secondary data. Statistics is a typical quantitative method;
- The methods of qualitative analysis of economic phenomena and processes are designed to identify their specific causes and mechanisms, with special attention being paid to the description, interpretation, explanation of the characteristics of the studied economic objects and relations, by providing more complex information.

Each method leads to different types of data and knowledge. Different types of conclusions lead to different action options when the whole planning process is completed. Therefore, choosing the method is a significant stage. There exist exclusively quantitative or qualitative methods, while others contain both quantitative and qualitative elements. Those methods are not standard recipes, but they facilitate the awareness of existing gender inequalities.

The process of mainstreaming the gender equality is not generated by the use of one or several methods out of the ones described below. However, the methods make sure that the adopted decisions and actions taken are based on a qualified professional approach. In this regard, the mainstreaming strategy can be compared with other fundamental processes of change in a democratic society.

The choice of an appropriate method depends on the task, context and available resources. There are many similarities between different gender analysis frameworks: for example, all recognise and emphasise the existence of reproductive work along with the productive activities. However, despite the multiple similarities, the analysed gender analysis framework differs depending on its scope and meaning.

These frameworks are practical tools designed to help users mainstream the gender

analysis in planning and social research activities. Gender analysis frameworks are useful if they help one think and do things individually/in one's own way; they are not helpful, if one finds them too confusing, bureaucratic and restrictive. It is also essential to understand that a framework will not do someone's work, it can help one plan their work, and subsequently the findings and recommendations should be applied consistently.

Reports of international institutions and organisations and of the Governments of States that apply gender analysis consistently describe various methods used to carry out gender analysis in various sectors and programs. If we were to classify them, a basic criterion would be the methods applied at macro-economic level (during the design and implementation of policies /strategies/ programmes) and at micro-economic level (in a public or private entity).

The following methods have been used in Sweden, Denmark, Canada, and United Kingdom. The purpose of these examples is to show how to perform the gender analysis in order to promote gender objectives in policies and projects financed by municipalities, and which are the key elements of the gender analysis.

The main focus of these frameworks is to clarify the differences between *Practical and strategic needs* of different categories of citizens.

The practical needs can be defined as immediate needs (water, shelter, food, income and health care) in a specific context. Projects related to the practical needs generally include solutions for inadequate living conditions.

On the other hand, **strategic needs** refer to the status of women compared to the one of men in a society. These interests vary from context to context and are related to the roles and expectations of women and men, and to gender division of labour, resources and power. Strategic interests may include obtaining certain rights, eliminating differences in wages, protection against domestic violence, increased decision-making power and control over one's own body.

Several international authors and experts make reference to the following Gender Analysis Frameworks:⁹

- A. Harvard Analytical Framework;
- B. DPU Frameworks: which include Moser Framework and Levy Framework, named after their authors;
- C. Gender Analysis Matrix (GAM);
- D. Equality and Empowerment Framework (Longwe);
- E. Capacities and Vulnerabilities Framework (CVA);
- F. People Oriented Planning Framework (POP);
- G. Social Relations Framework (SRF).

The frameworks were developed to address different aspects of gender equality and therefore are useful for different policy priorities. They are designed to explore: the

⁹. UNDP Learning and Information Pack. Gender Analysis.

division of labour between men and women in agriculture and in urban areas (Harvard and Moser, respectively), gender mainstreaming in institutions (Levy), gender differences and impact of projects at community level (GAM), valuing the contribution of an intervention in all sectors of women empowerment (Longwe) in case of humanitarian issues and preparation for disasters (CVA), refugee issues, based on a broad approach of Harvard Framework – (POPs), and sustainable development and institutional changes (SRF). Harvard and Moser Frameworks were extremely important in explaining the gender division of labour, the basic social structure of gender analysis attempts to reveal the differences between productive labour and social reproduction. Moser also divides the work into social reproductive work into two categories - household work and community management work.

The Harvard Analytical Framework whose principles and structure build on other framework, is designed as a planning tool, applicable at the stage when a planning process is identified before designing the activities. However, it can also be used at project estimation stage to assess the possible gender impact a project or programme may have where the social and poverty impact assessment provides erroneous data.¹⁰

The aims of framework. Harvard Framework has been designed to show that there is an economic incentive to allocate resources for women and men alike. The purpose of the framework is to help plan projects more efficiently and improve the overall productivity. The framework does this by mapping activities and resources that belong to men and women in a community, and highlights the main differences.

The Harvard Analytical Framework is a grid (also known as a matrix) for collecting data at the micro-level (i.e., at the community and household level). It is a useful way of organising information and can be adapted to many situations.

Boxa 6.4

The Origin of the Harvard Analytical Framework

The Harvard Analytical Framework, also called the Gender Roles Framework, is one the first frameworks for understanding the differences between men and women in their participation in the economy.

The framework was developed in 1980, at the request of the World Bank for Harvard University to organize a training session for Women in Development (WID). The Harvard Institute for International Development developed the framework in cooperation with WID office of USAID. It was first described in 1984 by Catherine Overholt, Mary Anderson and Kathleen Cloud called “the Harvard team.” It is one of the earliest of such frameworks. The starting point for the framework is the assumption that it makes sense for development aid projects to allocate resources to women to the same extent as to men, which will make development more efficient – a so-called “efficiency approach.”

Washington O. Ochola, Pascal C. Sanginga and Isaac Bekalo. *Managing Natural Resources for Development in Africa*. IDRC. pp. 238–239. ISBN 9966-792-09-0.

¹⁰. Candida March, Ines Smyth and Maitrayee Mukhopadhyay, A guide to gender – analysis framework, 1999, available at: <https://www.ndi.org/files/Guide%20to%20Gender%20Analysis%20Frameworks.pdf>

The Harvard Analytical Framework has four main components to follow.

Stage 1. The Activity Profile

This stage identifies all relevant productive and reproductive tasks and answers the question: *who does what?*

Those areas of activity which the project is designed for require the greatest detail. For instance, an activity profile for an agricultural project would list, according to the gender division of labour, each agricultural activity (such as land clearance, preparation and so on) for each crop, or each type of field.

Depending on the context, other parameters may also be examined:

- Gender and age: identifying whether adult women, adult men, their children, or the elderly carry out an activity;
- Time allocation: specifying what percentage of time is allocated to each activity, and whether it is carried out seasonally or daily;
- Activity locus: specifying where the activity is performed, in order to reveal people's mobility (is work done at home, in the family field, the family shop, or elsewhere (within or beyond) the community?).

Stage 2. The access and control profile - resources and benefits

The completion of this stage enables users to list what resources people use to carry out the tasks identified in the "Activity Profile". It indicates whether women and men *have access* to resources, who *controls their use*, and who *controls the benefits* of a household's (or community) use of resources. Access to resources simply means that you are able to use a resource; but this says nothing about whether you have control over it. For example, women may have some access to local political processes but little influence or control over which issues are discussed and the final decisions. The person who controls a resource is the one ultimately able to make decisions about its use, including whether it can be sold.

Stage 3. Influencing factors

This stage charts factors which influence the differences in the gender division of labour, access, and control of resources. Identifying past and present influences can give an indication of future trends. Influencing factors also present opportunities and constraints to increasing the involvement of women in development projects and programs. These factors are far-reaching, broad and interrelated. They include:

- community norms and social hierarchies, such as family/community, cultural practices, faith and religious traditions;
- demographic conditions;
- institutional structures, including the nature and level of bureaucracy, arrangements for the generation and dissemination of knowledge, skills, and technology;
- general economic conditions, such as poverty levels, inflation rates, income distribution, international terms of trade, and infrastructure;

- internal and external political events;
- legal framework;
- training and education.

The purpose of identifying these influencing factors is to consider which ones affect women's and men's activities or resources, and how they, in turn, can affect them. This stage is intended to help you identify external constraints and opportunities which you should consider in planning the activities. It also helps you anticipate what inputs will be needed to make interventions successful from a gender perspective.

Stage 4. Checklist for project-cycle analysis

At this stage, a list with a series of questions is designed to assist you to examine a project proposal from a gender perspective, using gender-disaggregated data and capturing the different effects of social change on men and women.

The Moser Framework¹¹ is another gender analysis framework. It highlights the need for gender-based planning taking into account women empowerment aspects.

The aims of framework. The Moser Framework aims to set up the “gender planning” as a type of planning in its own right: “The goal of gender planning is emancipation/liberation of women from their subordination/obedience, and their achievement of equality, equity, and empowerment. This varies widely in different contexts, depending on the extent to which women as a category are subordinated in status to men as a category” (Moser, 1993).

The Moser Framework questions assumptions that planning is a purely technical task. Moser characterises gender planning as distinct from traditional planning methods “first [gender planning] is both political and technical in nature. Second, it assumes conflict in the planning process. Third, it involves transformational processes. Fourth, it characterises planning as “debate”. (Moser, 1993)

At the heart of the Moser Framework are three concepts:

- Women's triple role;
- Practical and strategic gender needs;
- Categories of WID/GAD policy approaches (policy matrix).

Stage 1. Gender roles identification /triple role

This stage involves mapping the gender division of labour “who does what?” Caroline Moser identifies a “triple role” for low-income women in most societies used in this framework. Women's triple role includes: reproductive, productive and community management work. In contrast, men engage, primarily, in production and community policy activities.

¹¹ Candida March, Ines Smyth, and Maitrayee Mukhopadhyay, A guide to gender – analysis framework, 1999, available at: <https://www.ndi.org/files/Guide%20to%20Gender%20Analysis%20Frameworks.pdf>

Reproductive work: involves the care and maintenance of the household and its members, including childbearing and rearing, cooking, collecting water and firewood, shopping, family members' health care. In poor communities, reproductive work, for the most part, is time consuming and labour intensive. It is almost always the responsibility of women and girls.

Productive work: this involves the production of goods and services for consumption and trade. Both women and men can be involved in productive activities, but their functions and responsibilities often differ. Women's productive work is often less visible and less valued than men's.

The community work: these activities include collective organisation of social events and services – ceremonies and celebrations, activities to improve the community, participation in groups and organisations, local political activities. This type of work is seldom considered in economic analyses, yet it involves considerable volunteer time and is important for the spiritual and cultural development of communities. It is also a vehicle for community organisation and self-determination. Both women and men engage in community activities, although a gender division of labour prevails here.

The analysis of the triple-role in a planning framework is necessary, because any intervention in one area of work will affect the activities performed in the other two areas.

Stage 2. Gender needs assessment

The second stage of the framework is based on Moser Maxine Molyneux concept (1985) of women's gender interests. The concept is based on the idea that women as a group have needs, which differ from those of men as a group; not only because of women's triple work role, but also because of their subordinate position to men in society. Similar to Molyneux's concepts of practical and strategic gender interests, Moser distinguishes between two types of gender needs: practical and strategic ones.

Practical gender needs: Moser defines practical gender needs as those which, if they were met, would assist women in their daily activities. Interventions which focus on meeting practical gender needs respond to an immediate perceived necessity in a specific context, often related to inadequacies in living conditions. Meeting practical gender needs does not challenge the existing gender division of labour or women's subordinate position in society, although there are the causes of women's practical gender needs. Interventions which are intended to meet women's practical gender needs include:

- Water provision;
- Health-care provision;
- Opportunities for earning an income to provide for the household;
- Provision of housing and basic services;
- Distribution of food.

These needs are shared by all household members, yet women often identify them

as their specific needs, because it is women who assume responsibility for meeting their families' requirements.

Strategic gender needs: Moser defines these as needs which, if they were met, would enable women to transform the existing imbalances of power between women and men. Women's strategic gender needs are those which because of women's subordinate social status and vary depending on the context. They relate to gender divisions of labour, power, and control, and may include such issues as equal rights, domestic violence, equal wages and women's control over their own body. Meeting strategic gender needs helps women achieve greater equality, and challenges their subordinate position, including their role in society. Interventions which address women's strategic gender needs include:

- Challenges to the gender division of labour;
- Alleviation of the burden of domestic labour and child care;
- The removal of institutionalised forms of discrimination such as laws and legal systems biased in favour of men;
- Provision of reproductive health services, offering women choice over child-bearing;
- Measures against male violence. (Molyneux, 1985)

Stage 3. Disaggregating control of resources and decision-making within the household

At this stage, we obtain answers to questions: Who controls what? Who decides what? How? Here, the Moser Framework links the allocation of resources within the household (intra-household allocation) with the bargaining processes which determine this. Who has control over the resources within the household and who has the power of decision-making over allocation of resources?

Stage 4. Planning for balancing the triple role

Users of the framework are asked to examine whether a planned programme or a project will increase a woman's workload in one of her roles, to the detriment of her other roles.

Women must balance competing demands on their reproductive, productive and community responsibilities. The need to balance these roles determines the women's involvement in each of the roles, and potentially constrains their involvement in activities which will significantly increase the time they need to spend in one particular role.

Box 6.5

Origin of Gender Analysis Matrix

The Gender Analysis Matrix (GAM) was developed by Rani Parker, in collaboration with development practitioners working for a Middle Eastern NGO. They expressed a need for a framework appropriate to their grassroots work. As a result, the GAM is very much influenced by the reality and ideology of participatory planning; it can also accommodate the constraints imposed by shortage of funding and time, illiteracy, and insufficient or non-existent quantitative data on gender roles.

Candida March, Ines Smyth, and Maitrayee Mukhopadhyay,
A guide to gender – analysis framework, 1999

Moser also highlights how sectoral planning (which concentrates only on one area, such as transport, which is commonly undertaken by the governments) has very often been particularly detrimental to women, since it does not consider the inter-play between women's triple roles. Carrying out intersectoral planning would avoid this problem.

Stage 5. Distinguishing between different aims in interventions: the WID/GAD Policy Matrix

This is the stage of evaluation, examination of what approach has been used in an existing project, programme or policy. Examining the policy approaches can help you anticipate the inherent weaknesses, constraints and possible pitfalls.

The Moser Framework encourages users to consider how different planning interventions transform the subordinate position of women by asking: to what extent do different approaches meet practical and/or strategic gender needs?

Stage 6. Involving women, and gender-aware organisations and planners, in planning

Finally, Moser Framework asks users to think about the importance of involving women, gender-aware organisations, and planners in planning.

This is essential to ensure that real practical and strategic gender needs are identified and incorporated into the planning process. These individuals or organisations must be involved not only in the analysis, but also in defining the goals of an intervention, and in its implementation.

Gender Analysis Matrix (GAM) is another gender analysis framework.

Aims of framework. The GAM aims to help determine the different impact interventions have on men and women, by providing a community-based technique for identifying and analysing gender differences. The GAM is a transformational tool, in that its use is intended to initiate a process of gender analysis by community members themselves. The framework encourages the community to identify and challenge their assumptions about gender roles. The GAM is based on the following principles:

- All requisite knowledge for gender analysis exists among the people whose lives are the subject of the analysis.
- Gender analysis does not require the technical expertise of those outside the community, except as facilitators.
- Gender analysis cannot promote transformation unless it is carried out by the people being analysed. (Parker, 1993)

The GAM is filled in by a group within the community which, preferably, should include women and men in equal numbers. The GAM can be used at different project stages, to assess both the potential and the actual impact of an intervention on the community's gender relations. The objectives at each stage are as follows: "At the planning stage to determine whether potential gender effects are desirable and consistent with programme goals; at the design stages where gender considerations may change the design of the project; or during the monitoring and evaluation sta-

ges, to address the broader programme impacts.” (Parker, 1993)

The GAM features two main stages based on a matrix which focuses on the analysis of the impact of a development intervention.

Stage 1. Analysis at four levels of society

The GAM analyses the impact of development interventions at four levels: women, men, households and communities. Other levels (depending on the objectives of a project and community in question), such as age group, class, ethnic group, and so on) can be added as appropriate. The four main categories that appear vertically on the GAM matrix are:

Women: This category refers to women of all ages who are in the target group, or to all women in the community.

Men: This refers to men of all ages who are in the target group, to or all men in the community.

Households: This category refers to all women, men, and children living together, even if they are not part of one family. Although the type of households may vary even within the same community, people always know what constitutes their “household” or “family”. Their own definition or unit of analysis should be used for this level in the GAM.

Community: This category refers to everyone within the project area. The purpose of this level is to extend the analysis beyond the family. However, communities are complex and they usually comprise a number of different groups of people with different interests. So, if a clearly defined “community” is not meaningful in the context of the project, this level of analysis may be eliminated. (Parker, 1993)

Stage 2. Analysis of four kinds of impact.

The GAM looks at the impact on four areas: labour, time, resources (considering both access and control), and socio-cultural factors. These categories appear horizontally in the GAM matrix.

Labour: This refers to changes in tasks (for example, fetching water from the river), the level of skill required (skilled or unskilled, formal education, training) and labour capacity (How many people carry out a task, and how much can they do? Is it necessary to hire labour, or can members of the household do the work?).

Time: This refers to changes in the amount of time (three hours, four days, and so on) it takes to carry out the task associated with the project or activity.

Resources: This category refers to the changes in access to resources (income, land, and credit) as a consequence of the project, and the extent of control over changes in resources (more or less) for each group analysed.

Socio-cultural factors: This refers to changes in the social aspects of participants’ lives (including changes in gender roles or status) as a result of the project. (Parker, 1993)

The 4R Method¹² (Representation, Resources, Reality and Reaction). Originally, it was known as the 3R Method, which was developed by “Svenska Kommunförbundet” in Sweden in 1996, to implement the mainstreaming in Swedish municipalities.

It is one of the most used methods of mainstreaming gender equality into the development of various public policies, programs and projects. The main issue tackled is the distribution of decision-making and action power between men and women, and the level of involvement of each gender in the design and implementation of activities of policies, programs and projects, and it requires the analysis of gender, norms, values and concepts, in accordance with which activities are carried out in the social dimension.

When public policies are developed, for example, the political decisions taken affect women and men differently, even if such decisions do not concern gender equality explicitly. Because women and men lead different lives, these differences should be considered not to be emphasised, but to better meet different needs. Thus, a development strategy, which includes gender equality, is a strategy that does not discriminate any gender differences and does not exclude one or another kind of development, implementation and benefits of the given strategy.

The 4R Method provides tools for concrete discussions on how gender equality can be mainstreamed in the field or activity we are involved in. Instead of banging about equality, in general, one should discuss how the rules governing our work obstruct or promote gender equality.

This analysis method tends to clarify:

- Who does what and for how long?
- How can gender mainstreamed at the stage of formulating a project vision and objectives?
- What can be changed in the objectives to attain gender equality?

1R and 2R are quantitative analysis tools and require a systematic review of the distribution and use of resources. 3R and 4R are qualitative tools and concern the norms and values used in a community/organisation/public institution’s activities and to how undertake interventions in order to change them.

1R – Representation. Mapping gender representation. It answers the question: “How many women and how many men?” The answer provides information on the share of women and men present at all levels of decision-making and in various operations, i.e. decision-makers, staff and users.

Types of questions: How many women and how many men are members of councils/commissions/committees and how many are chairs thereof? How many women and how many men have liaised with/How many women and how many men were consulted by councils/commissions in the decision-making process? How many women and how many men receive social security? How many women and how many men are part of the program and project implementation team? How many

¹² Bocioc Florentina and others, “Gender mainstreaming methods and tools”, A Practical Guide on gender equality mainstreaming, CPE 2004.

women and how many men belong to the target group of policies, programs and projects? and so on.

2R – Resources. Examination of resource allocation. When referring to resources, one considers any means needed to fulfil activities (material resources, money, time, space, etc.).

It answers the question: How are resources – money, space and time – allocated for women and men? The answers indicate how resources are divided between women and men for different operations. Types of questions: How much money do men receive and how much money do women receive from the social security system? How much do women talk and how much do men talk at commission meetings? What space do boys and girls use in kindergarten? and so on.

3R – Reality. Analysis of conditions. It answers the question: What are the reasons for gender division and for the existing allocation of resources between men and women? Those are qualitative questions resulted from looking at 1R and 2R. Why are some different problems allocated different time during the meetings organised by the administration? What value is attributed to the experience and knowledge of women and men in the community? If women and men have different ways to access the information, to which fact is this due? Why do women and men have different opportunities to participate in meetings? How can the working methods be changed to enable equal participation of women and men? and so on.

4R – Responses. Formulation of new objectives. It answers the question: How do we respond to issues identified? What actions are needed to remedy the gender disparities identified? What are the best ways to increase the involvement of women in decision-making? What are the priority issues one should intervene in?

After the analysis is performed, it is essential to decide whether the policy, program or activity should be changed to achieve the desired gender objectives.

Checklist:

1. *Explain the need for conducting the gender analysis of the budget.*
2. *What is the purpose of gender analysis?*
3. *Define the concept of gender analysis.*
4. *Explain the difference between gender equality and gender equity.*
5. *Who conducts the gender analysis and what skills are necessary to conduct a gender analysis?*
6. *What are the benefits of gender analysis? For the Government? For the civil society?*
7. *What are the main elements of gender analysis?*
8. *Name and explain the stages of preparing the gender analysis.*
9. *Name and explain the principles of conducting gender analysis.*

10. What is the difference between gender analysis, gender impact analysis and gender audit?
11. What are the criteria for gender impact analysis?
12. Explain the essence of gender analysis stages suggested by Diana Elson.
13. What is the essence of economic research quantitative methods applied in gender analysis?
14. What is the essence of qualitative analysis methods applied in gender analysis?
15. Explain the gender analysis methodology developed by Rhonda Sharp.
16. Determine the differences between practical and strategic needs?
17. What is the objective and stages of Harvard Analytical Framework?
18. What stages should be completed to apply the framework for conducting the gender impact analysis?
19. Explain the essence of the Moser Fender Analysis Framework.
20. What is the essence of implementing the Gender Analysis Matrix?
21. Explain the essence of the 4R Method in implementing gender mainstreaming in municipalities?

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Topic 7. PROMOTING GENDER MAINSTREAMING INTO PUBLIC POLICIES

Keywords: public policy, gender-blind policies, economic governance, gender-aware policies, gender-neutral policies, gender-specific policies, gender-redistributive policies.

7.1. Contents, scope and classification of public policies in terms of gender

Currently, gender mainstreaming is a key strategy in achieving the sustainable development goal. Gender dimension affects all public policies, governmental decisions, programmes, financial and administrative activities, and organisational procedures, thereby contributing to a profound organisational transformation.

A public policy is a set of interrelated decisions (an intended course or a process) established by a political group (Government) when determining the goals and the means used to achieve these goals, and targets issues of general interest. Depending on the area in which they operate, public policies are aimed at: human rights; environment; (internal and external) security; migration; economic transport and telecommunications; regional development; Research and Development; family; employment; housing, social security; health; and marginalised individuals and groups of individuals, etc.

According to the 1995 Beijing Platform for Action, governments and other actors should “promote an active and visible integration of gender into all policies and programmes so that before decisions are made, an analysis of effects on women and men, respectively, is carried out.” And the main public policies which need to be revised in terms of gender are: human rights, violence against women; education; health; children and youth; power and decision-making; institutional mechanisms; management of natural resources.¹

The **importance** of gender mainstreaming into public policies derived from the following five major considerations:

1. *Putting people at the heart of policies.* Policy makers need to focus more on the policies’ effects on citizens’ lives. It is a human and less economic approach in the management of contemporary societies.
2. *Leading to better governance* through better resource management and its

¹. See paragraphs 79, 105, 123, 189, 202, 229, 252, and 273 of the *Platform for Action*, Fourth World Conference on Women, Beijing, 1995. Available at: <http://www.un.org/womenwatch/daw/beijing/platform/index.html>

impact on women and men.

3. *Use of all human resources through increased involvement of both women and men.* Since the people involved in mainstreaming are those who usually work, it helps increase the number of actors involved.
4. *It provides greater clarity of gender equality issues in a society.* The mainstreaming approach shows that gender equality is a fundamental issue affecting the overall development of a society.
5. *It entails a diversity of interests and behaviours of women and men.* The equality policy is aimed at all women, but mainstreaming takes into account the particular situations of men and/or different groups of women and men (migrants, young women, etc.).

Promoting gender mainstreaming into public policies requires a comprehensive quality review of the existing policies. *The need for change* can be justified by the fact that routine procedures and policies, and the policies themselves, have been inherently blind to gender or biased. In this regard, it is useful to identify the positioning of policies in terms of gender, according to the existing classification in the specialised literature², namely:

1. **Gender-blind policies**, which recognise no distinction between the sexes. These policies include the deviations in gender relations in a given society, and, therefore, tend to exclude women.
2. **Gender-aware policies**: This type of policy recognises that women are important development actors in society as well as men; that the nature of women's involvement is determined by gender relations in a given society, which make their involvement different, and often unequal; and that consequently, within these policies, it accepts that women may have different needs, interests, and priorities which may sometimes conflict with those of men.

These policies distinguish two sub-categories such as:

a) *Gender-neutral policies* use the knowledge of gender differences in a given society and set out the objectives to overcome biases, to ensure that development interventions target and benefit both sexes effectively to meet their practical gender needs. Gender-neutral policies work within the existing gender division of resources and responsibilities in the society.

b) *Gender-specific policies* use the knowledge of gender differences in a given context or to respond to the practical gender needs of women or men; they work within the existing gender division of resources and responsibilities.

1. **Gender-redistributive policies** are interventions intended to transform the existing distributions to create a more balanced relationship between women and men, touching on strategic gender interests. Gender-redistributive policies may target women or men separately, or only one specific group. The main feature of these policies is that they work on women's practical gender

² March C., Smyth I., Mukhopadhyay M. *A Guide to Gender-Analysis Frameworks*. Oxfam publication GB, 2005. p. 108-109. Available at: <https://www.ndi.org/files/Guide%20to%20Gender%20Analysis%20Frameworks.pdf>

needs, but do so in ways which have transformational potential, which help create supportive conditions for women to empower themselves.

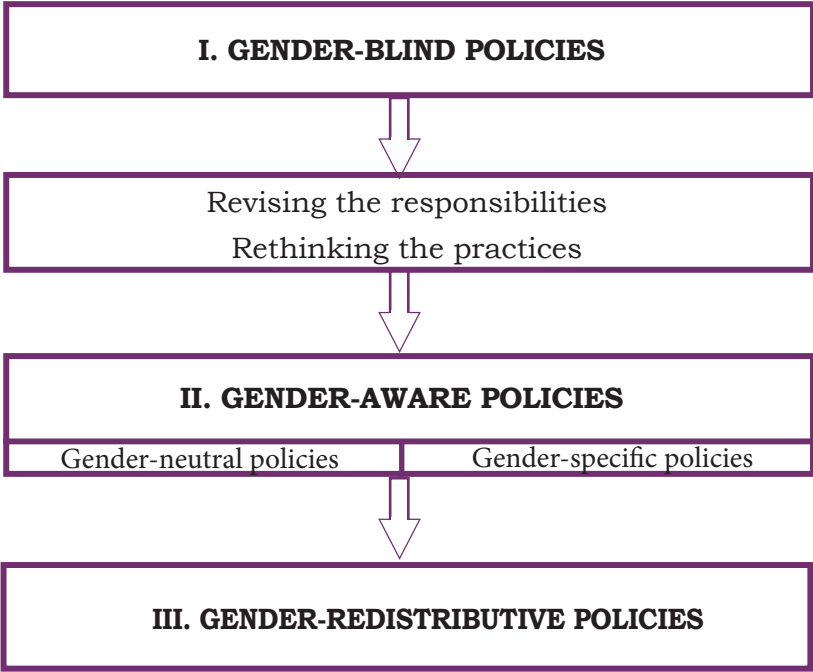


Figure 7.1. Classification of policies in terms of gender sensitivity

Source: March C., Smyth I., Mukhopadhyay M. *A Guide to Gender-Analysis Frameworks*. Oxfam publication GB, 2005. p. 108-109. Available at: <https://www.ndi.org/files/Guide%20to%20Gender%20Analysis%20Frameworks.pdf>

These different approaches are not mutually exclusive, and one may be a precursor to another. For instance, in situations where gender-blind planning has been the norm, moving towards gender-neutral policies would be a significant shift forward the redistributive ones. In some situations, it may be counter-productive to start with gender-redistributive policies, and a better approach may be a gender-policy meeting the gender-specific needs.

The promotion of the mainstreaming approach in public policies requires the re-organisation of the usual procedures and regulations, as well as of responsibilities and capacities, to mainstream gender in all such procedures, regulations, responsibilities, capacities, etc. It also requires the use of gender expertise, gender impact analysis, inclusion of consultations, and the participation of relevant groups and organisations. Only when all these (pre-)conditions are met, one can say that mainstreaming is underway.

7.2. The basic principles and ways of mainstreaming gender into public policies

Gender mainstreaming is a comprehensive system-wide (systemic) strategy. To achieve gender equality, the responsibility for gender mainstreaming must rest with the decision-makers at the highest decision-making level. In a company, it is the level of director and the administrative board of the company, and at the local government level, it is the mayor and local council level, and at national level it is the Prime Minister and Parliament.

A successful gender mainstreaming process is possible only when certain **basic principles** are complied with, namely:

1. *Applicability in all spheres and fields.* Any policy, programme, project, budget, activity should be viewed and analysed in terms of gender.
2. *Equal participation in decision-making processes.* Increasing the level of women's equal participation at all decision-making levels, and consultation of community, is an important part of the process.
3. *Identifying gender implications.* The initial identification of issues and problems in all areas of activity should be done so that gender differences and lack of equality can be diagnosed. Gender implications should be identified at the beginning of the planning stage. Creating scenarios is one of the methods used in this regard, which will identify and analyse the direct and indirect influences on women and men.
4. *Gender-based re-allocation of resources.* Clear political power and adequate allocation of resources for mainstreaming, including additional financial and human resources, if necessary, are important for the implementation of the concept. *Gender mainstreaming* requires a commitment in making re-allocations in all activities to achieve the specific equality objectives.
5. *Priority and complementarity.* Gender mainstreaming does not replace the specific policies and programmes for women, and the positive legislation. While trying to plan equally for women and men, it is still important to plan women-focused programmes. Thus, specific policies may be needed to improve the situation of a group of women by improving public transport, kindergartens or by creating jobs closer to their place of living, and by improving their children's school schedule. A positive legislation is targeting, for example, tax reductions for single parents (mostly women) who will combine work with family responsibilities, and will increase the income of that group.
6. *Constant awareness-raising.* Gender mainstreaming approach does not exclude the need for gender units or information centres. Gender mainstreaming is a continuous improvement process due to the constant changes in a developing society. For this reason, gender units or information centres in charge of monitoring gender policies are helpful in tracking the impact of policies, and in providing decision-makers with the data, knowledge and recommendations implicitly.

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7. *Implementation mechanism's functionality.* It entails the establishment of adequate mechanisms for responsibility to monitor the progress and functionality of processes subjected to mainstreaming. The availability of a plan specifying the different needs of men, women, boys and girls is not enough. It must include procedures, indicators, specific objectives and targets to enable the control over the implementation outcomes and mechanism's functionality. Individuals involved in the implementation will be in charge of monitoring the implementation of objectives, and achievement of targets and indicators.

The necessary conditions for the promotion of gender mainstreaming:

- *Political will and responsibility.* The supreme authority, the Government, or in case of an organisation, its director should initiate or declare the intent, which should state clearly the wish to include the equality between women and men to achieve gender equality;
- *Availability of statistics* on the current situation of women and men (gender-disaggregated statistics);
- *Availability of studies* on equality, which allow for better understanding of gender relations, and identification of gender inequalities;
- *Availability of human and financial resources.* This refers to the existence of prepared and trained people with skills in organizing and guiding the activities, as well as to the reallocation of existing funds for broader participation of women in the decision-making;
- *Knowledge of the administration.* The mainstreaming approach includes both reorganisation, implementation and evaluation of all processes within a policy and the quality management system, which entails the creation of an effective communication and information system;
- *Women's real participation* in political and public life and in decision-making. It is important that women that often claim the principle of gender equality can find their place in the decision-making process to promote the values, interests and situation of different groups of women.

In the broad sense, **the scope** of gender mainstreaming refers to: policy development; decision making; access to resources; procedures and practices; methodologies; implementation processes; monitoring and evaluation work.

In 2007, the Swedish Committee³ which has vast experience and a methodology applied in various fields, formulated as **the eight-step procedure** for sustainable gender mainstreaming approach:

³. Boman Ann, Eklund Ulrika, Lofgren Carina, *Gender Mainstreaming Manual. A book of practical methods from the Swedish Gender Mainstreaming Support Committee.* Printed by Edita Sverige AB, Stockholm 2007. <http://www.government.se/contentassets/3d89b0f447ec43a4b3179c4a22c370e8/gender-mainstreaming-manual-sou-200715>

The 8-step gender mainstreaming procedure

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|--|--|
| Step 1. Basic understanding | Information and documentation of all staff through specialised courses on: national gender policy; gender system theory; gender mainstreaming approach strategy. |
| Step 2. Examination of conditions. | <i>It will examine:</i> <ul style="list-style-type: none"> • if the conditions required for change exist; • possible benefits that can be obtained following the implementation; • if managers and staff want to create processes on gender equality; • what operations or processes can be helpful, and what obstacles may be faced. |
| Step 3. Planning and organisation. | Developing an explicit plan for gender implementation as such and organisation of work: <ul style="list-style-type: none"> • drafting the instructions, and clear definition of requirements; • formulating the objectives, the detailing and delegation at different levels; • laying down clearly who is responsible and what resources have been allocated for each task; • organising the evaluation process, and introducing the follow-up system; • training on the use of gender analyses, and application of methodologies; • constant support and coordination. |
| Step 4. Examination of activities. | Two analytical activities shall be used: <ul style="list-style-type: none"> • Gender impact assessment; • Gender analysis. |
| Step 5. The study and analysis. Step 6. Formulation of new objectives and measures. | <i>Methods for performing the analysis shall be used, such as:</i> the 4R Method (representation, resources, reality, result); the “Gender analysis Plus” method; the Process Mapping and other methods. |

| | |
|--|--|
| Step 7. Implementation of measures. | It refers to the actual process of implementation, and management has the role to clarify the decisions on what should be done and by whom. |
| Step 8. Evaluation of outcomes. | The method used “Evaluating gender equality outcomes” includes certain steps, which relate to: activities, outcomes, costs, conclusions, measures/actions, proposals or recommendations for improvement, internal feedback, and external feedback. |

Source: Developed by the author based on: Boman Ann, Eklund Ulrika, Lofgren Carina, *Gender Mainstreaming Manual. A book of practical methods from the Swedish Gender Mainstreaming Support Committee.* Printed by Edita Sverige AB, Stockholm 2007. <http://www.government.se/contentassets/3d89b0f447ec43a4b3179c4a22c370e8/gender-mainstreaming-manual-sou-200715>

It should be noted that the general objective of gender mainstreaming, framed in the eight-step procedure, is: *Women and men should have the same power to shape society and their own lives.* At the same time, the benchmarks (intermediate objectives), concerned in each step, refer to:

1. *Equality in division of power and influence between women and men.* Women and men should enjoy the same rights and opportunities to be active citizens and to shape the conditions of the decision-making processes.
2. *Economic equality between women and men.* Women and men should have the same opportunities and conditions for education and paid work that will provide lifelong economic independence.
3. *Equal distribution of unpaid work and household activities.* Women and men should have the same responsibilities in the household work and the same opportunities to give and receive care on equal terms.
4. *Stopping male violence against women.* Women and men, girls and boys will have equal rights and opportunities in terms of physical integrity.

At the *European Union* level, the joint efforts on implementing the gender mainstreaming approach have resulted in the development of several methods, techniques and tools available for EU countries. The creation of the *European Institute for Gender Equality (EIGE)*⁴ to strengthen and promote gender equality has boosted activities related to the improvement of gender equality mechanisms, methodologies and databases. Therefore, the *methodology on mainstreaming gender* into different policies and/or planning processes is of interest. Mainstreaming gender in a policy means that the equality between women and men, as a general principle, must be considered in all decisions, at every stage of the policy making process by all actors involved. The integration of gender perspective is understood as a cycle with multiple stages: planning, implementation, monitoring and evaluation.

⁴ European Institute for Gender Equality. Available at: <http://eige.europa.eu/about-eige>

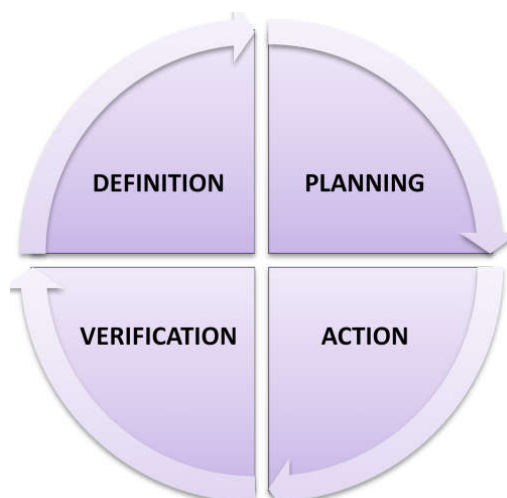


Figure 7.2. Cycle of mainstreaming gender into policies

Source: A practical guide to integrating the gender perspective into a policy/programming cycle, <http://eige.europa.eu/gender-mainstreaming/what-is-gender-mainstreaming>.

The presented gender mainstreaming cycle can be adjusted to different processes or activities related to policymaking. At the same time, each stage of the mainstreaming cycle contains the necessary elements for implementation, including stage-specific methods and tools, such as:

| Stage | Toolkit |
|---------------------|--|
| Definition | <ul style="list-style-type: none"> • Gender statistics • Gender analysis • Gender impact assessment • Consultation with stakeholders |
| Planning | <ul style="list-style-type: none"> • Gender sensitive budgeting • Gender sensitive procurement • Gender indicators |
| Action | <ul style="list-style-type: none"> • Training on gender equality • Institutional transformation • Raising awareness |
| Verification | <ul style="list-style-type: none"> • Monitoring • Evaluation |

Source: A practical guide to integrating the gender perspective into a policy/programming cycle, <http://eige.europa.eu/gender-mainstreaming/what-is-gender-mainstreaming>.

The positive impact on the society development obtained from a gender-based re-evaluation of the national strategies and plans reflects the need for to revise all sectors or areas as they have a direct or indirect influence on women or men. On the other hand, the simultaneous application in all areas is difficult for several reasons. The international experience shows that gender mainstreaming is optimal if initiatives begin with the key areas, such as employment, education, social policy and family. Another possibility is to start the implementation process in areas considered to be gender-blind (urban policies, transport policies or research policies).

Gender mainstreaming approach has a big impact when major reforms are implemented or new pieces of legislation are prepared. This is considered the optimum time for its application. However, gender mainstreaming must be applied at all levels: national, regional and local, taking into account the (unitary or federal) structure of the country. The determining level is considered the local one, which is the closest to women's and men's needs in the community, through the direct and immediate impact of the decisions made.

Checklist

- 1. What is a public policy?***
- 2. Classify public policies by areas in which they work.***
- 3. What are the major arguments in favour of gender mainstreaming approach?***
- 4. What is the importance of promoting gender mainstreaming approach?***
- 5. Classify the public policy positioning in terms of gender.***
- 6. Present the basic principles of gender mainstreaming process.***
- 7. Present the conditions necessary to promote gender mainstreaming approach.***
- 8. What is the eight-step procedure for gender mainstreaming in different areas?***
- 9. What are the common benchmarks (intermediate objectives) of the eight-step procedure?***
- 10. Present the gender mainstreaming methodology in different policies and/or planning processes developed at the EU level.***

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Topic 8. GENDER RESPONSIVE BUDGETING– A DEFINING FRAMEWORK FOR JUSTIFICATION OF ECONOMIC AND SOCIAL POLICIES

Keywords: macroeconomic policy, macrobudgeting, microbudgeting, gender responsive budgeting, economic governance, performance based budgeting, accountability mechanism.

8.1. Correlations between macroeconomic policy and gender equality

In the framework of public policy, **macroeconomic policy** plays an important role. *Macroeconomics* deals with the qualitative analysis of the mechanism for operation of the national economy, the correlations between macroeconomic variables, focusing on measuring their direct and indirect influences for scientific justification of macroeconomic policy decisions.

The components of *macroeconomic policy*, as viewed by area of concern, are as follows:

| | | |
|-------------------------------|-------------------------|---------------------|
| ➤ Monetary | ➤ Budgetary | ➤ Employment |
| ➤ Foreign exchange | ➤ Tax | ➤ Investment |
| ➤ Prices | ➤ Revenues | ➤ Industrial |
| ➤ Technical-scientific | ➤ Anti-monopoly | ➤ External |
| ➤ Sectorial | ➤ Infrastructure | ➤ Commercial |

The *macroeconomic decisions* are directed at the national economy (at branches, sectors, regions and international relations) in order to ensure efficient use of natural, human and capital resources to meet the needs of the society. These decisions have an impact on: the volume and structure of production at the country level; state budget and local budgets; people’s income and expenses; investments in the economy; pace of economic growth etc. Thus, analysis of conventional macroeconomics from the gender perspective highlights a number of specific issues needed for the sustainable development of any society.

The macroeconomic policy has been often perceived as gender neutral. However, the macroeconomic environment acts as a limiting structure, which promotes or limits the means to reduce gender differences in welfare. This implies that gender equality requires an enabling macroeconomic environment.

Since macroeconomics is based on aggregated indicators, conventionally, it is believed not to have a different effect on women and men, girls and boys. It is much easier to support and justify the existence of gender inequalities at micro level. However, there are a number of considerations showing that macroeconomics has a different impact on women and men, and namely:

- *Firstly*, institutions through which the macroeconomy operates are directly involved in various economic and social processes. The social and economic institutions determine how men and women have access to resources or control them, what potential or opportunities for participation are available and what benefits they can obtain from value creation, poverty reduction and development;
- *Secondly*, the 3 levels of the economy – micro, meso and macro – do not operate separately, they are interdependent and have multiple correlations and influences. Consequently, gender inequalities at the micro- and mezo- levels have implications for the macrolevel and the reverse;
- *Thirdly*, the burden of unpaid work (for family care and maintenance) falls on women and girls, as they are a significant part of the workforce and represent human capital, which is essential for the functioning of the labour market on which macroeconomics is focused, etc.

Thus, the consequences of macroeconomic policies go beyond the economic sphere through a gender-related impact on living standards in households and the society. In particular, in times of crisis, the effects of the macroeconomic policy on social hierarchies become prominent, which could increase stigmatization, stereotypes and violence. The macroeconomic policy for stabilization by reducing public expenditure and minimizing inflation decreases employment opportunities and living standards, as it happened with austerity programmes widely adopted in various countries in response to the 2008 world crisis.

Studies conducted by the World Bank show that the improvement of gender equality through macroeconomic policy in a ‘smart economy’ contributes to sustainable economic growth and development. Analysis of the main objectives of macroeconomic policy from the gender perspective highlights the existing direct and indirect interconnections between such objectives.

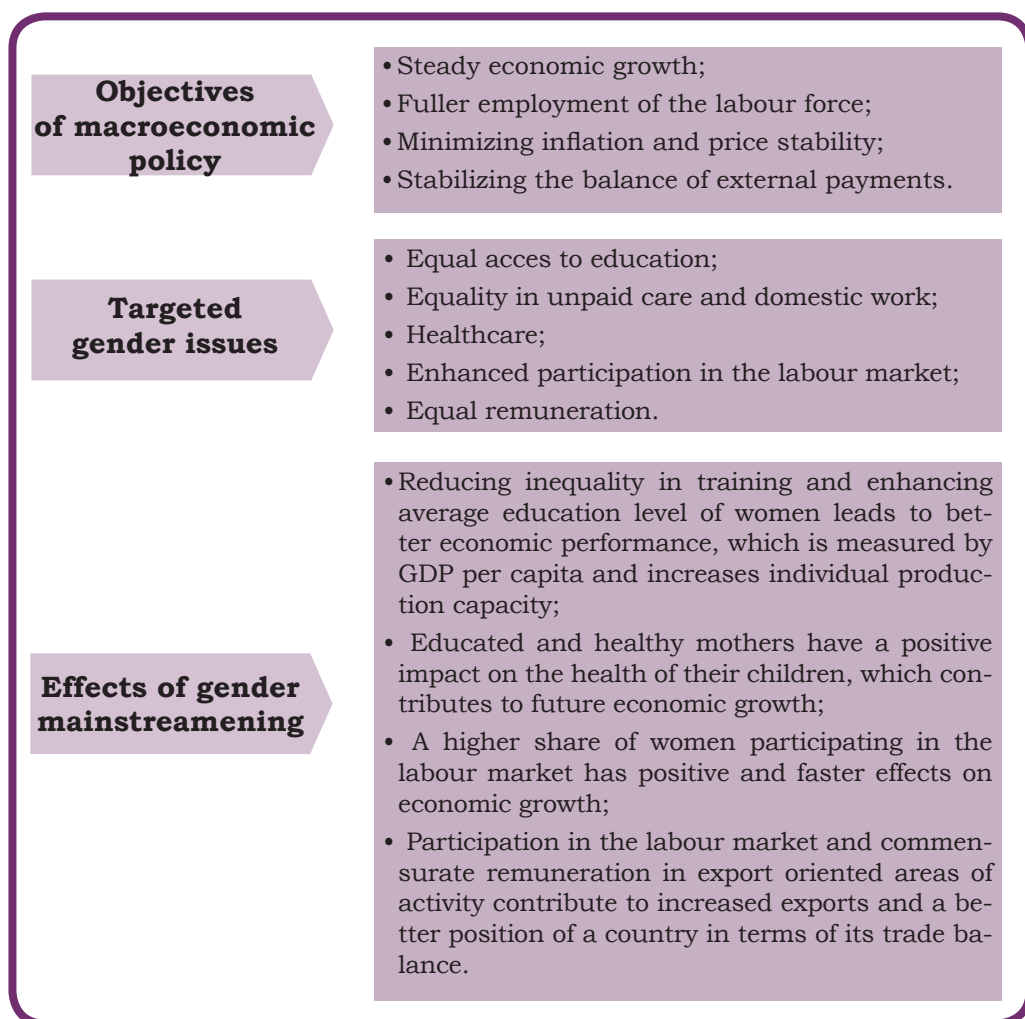


Figure 8.1. Correlations between economic policy objectives and gender equality in society

Source: Developed by author based on: *Towards an Enabling Macroeconomic Environment*, Available at: <http://progress.unwomen.org/en/2015/pdf/ch4.pdf>; Stephanie Seguino, *Financing for Gender Equality: Reframing and Prioritizing Public Expenditures to Promote Gender Equality*, 2013, p.12. Available at: http://iknowpolitics.org/sites/default/files/seguino_financing_for_gender_equality_final_jan_7_2013.pdf.

Conventional macroeconomics is focused on market conditions and therefore, all goods and services produced outside the market (unpaid work) are not included in the calculation of macroeconomic variables. Also, the current political processes and framework artificially separate the macroeconomic policy from the social one. The macroeconomic policy aims, in particular, at promoting economic growth and maintaining price stability. When these objectives are formulated, the impact of social policies on the macroeconomic environment, and respectively, on the future pathway of the economy, is not taken into account.

While social policies are recognized as important, they are implemented only once, as they are defined as part of general macroeconomic parameters. In particular, when modelling the macroeconomic environment the time needed for domestic work and unpaid care and their impact on individual and overall economic activity is not taken into account.

Social services are provided either through public services or by the private sector or by unpaid care and domestic work. They have direct implications on the macroeconomic situation. The development, education, health and social situation of the child have direct and long-term implications for productivity, economic growth and performance. Similarly, policies to support young people in their employment on the labour market have implications for the performance of the overall economy. The figure below shows the direct connection between the macroeconomic policy and the social policy based on human rights and gender equality.

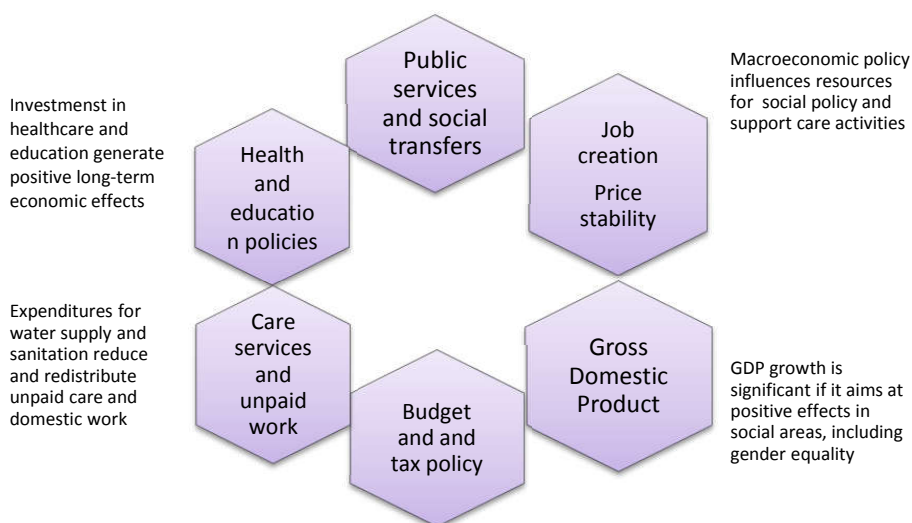


Figure 8.2. Connection between macroeconomic policy and social policy based on human rights

Source: *Towards an Enabling Macroeconomic Environment*, p.209. Available at: <http://progress.unwomen.org/en/2015/pdf/ch4.pdf>

Artificial separation of the economic policies from other public policies means insufficient attention paid to creation of jobs, unpaid work and social issues in formulating objectives within macroeconomic strategies. In this context, it is necessary to rethink and review the conceptual bases of the macroeconomic policy, bearing in mind that social policy, unpaid work, existing gender differences in a number of areas involve adverse effects on development and economic growth of a country.

Simultaneously, the wellbeing of a nation, as determined by the GDP per capita, does not fully reflect the increasingly growing inequalities between different social groups. Currently, many renowned economists support the need to rethink the method of measuring the welfare of countries, taking into account a greater number of variables that reflect the aspects of equality and observance of human rights.

Opinions and conclusions of the World Economic Forum on evaluation of progress through GDP macroeconomic indicator, Davos 2016

| | |
|--|--|
| Joseph Stiglitz economist, winner of the Nobel Prize | “GDP in the US has gone up every year except 2009, but most Americans are worse off than they were a third of a century ago. The benefits have gone to the very top. At the bottom, real wages adjusted for today are lower than they were 60 years ago. So this is an economic system that is not working for most people.” |
| Christine Lagarde, IMF President | “We have to go back to GDP, the calculation of productivity, the value of things – in order to assess, and probably change, the way we look at the economy.” ¹ |
| C o n c l u s i o n s of the Forum | GDP is an insufficient indicator for assessing progress; A more complex assessment of living standards and respect for equality is needed ² |
| Stiglitz J.: “What we measure informs what we do. And if we’re measuring the wrong thing, we’re going to do the wrong thing.” | |

Source: GDP - a poor measure of progress, say Davos economists, available at: <http://www.weforum.org/agenda/2016/01/gdp>

Thus, a number of principles and obligations can be outlined, which are particularly relevant for assessing macroeconomic policy from the perspective of human rights:

- ❖ The principle of non-discrimination and equality;
- ❖ The principle of minimum essential levels (individuals should not be deprived of essential food, basic shelter or education);
- ❖ The principle of progressive realization and non-retrogression: economic and social progress is measured in terms of the progressive realization of rights over time and in qualitative terms (determining GDP is a complementary quantitative component);
- ❖ The principle of maximizing available financial resources;
- ❖ The principle of accountability, transparency and participation in all areas;
- ❖ The principle of extraterritorial obligations in terms of exercising human rights when outside of own country.¹

If we refer to *maximizing available financial resources*, this principle relates to financial policy at macroeconomic level. The review of this policy from a gender perspective and human rights perspective leads, on the one hand, to restructuring and optimization of public funds, and, on the other hand, to a higher impact on beneficiaries and national economy in general.²

¹ Towards an Enabling Macroeconomic Environment, pp.2010-2011. Available at: <http://progress.unwomen.org/en/2015/pdf/ch4.pdf>

² Idem, pp.211-214. Available at: <http://progress.unwomen.org/en/2015/pdf/ch4.pdf>

Principle of maximizing available financial resources

| Directions of financial policy | Possibilities for maximizing financial resources at macroeconomic level |
|--|--|
| Tax policy | <p>Improving tax administration and increasing the efficiency of tax collection;</p> <p>Review of the tax system and initiating reforms;</p> <p>Introducing new taxes, for example, on services and financial transactions.</p> |
| Budget policy | <p>Review and re-prioritization of public spending (e.g., minimizing expenses for defence and maintaining public order);</p> <p>Review of spending for subsidizing or supporting specific areas (e.g., the financial sector).</p> |
| Public borrowing and debt restructuring | <p>Budget deficit financing should take into account human rights without affecting future revenue flows;</p> <p>Loans to finance social investment can raise productivity and encourage private sector investment, leading to higher rates of growth. A faster growth can generate additional economic growth through higher tax receipts.</p> |
| Monetary policy | <p>Impact assessment of monetary policy (inflation targeting) from the perspective of gender issues;</p> <p>Incorporating additional objectives, such as real productive activity, employment and revenue growth, while aiming to achieve human rights;</p> <p>Introducing requirements and incentives to encourage commercial banks to extend additional credit to areas of social concern, such as: housing, jobs, stimulating investment and small-scale agricultural enterprises; development banks;</p> <p>Increasing accountability, participation and transparency in formulation of monetary policy, including strengthening women's rights organizations.</p> |

Source: Developed by the author based on *Towards an Enabling Macroeconomic Environment*, Available at: <http://progress.unwomen.org/en/2015/pdf/ch4.pdf>; Seguino Stephanie, *Financing for Gender Equality: Reframing and Prioritizing Public Expenditures to Promote Gender Equality*, 2013, p.12. Available at: http://iknowpolitics.org/sites/default/files/sequino_financing_for_gender_equality_final_jan_7_2013.pdf

Macroeconomic constraints in gender equality and human development, which have been observed over the last two decades, highlight the need to develop alternative macroeconomic policies at the country level. Ministries of Finance and central banks should develop additional evaluation techniques, to assess in an effi-

cient manner the public sector costs in all areas, but especially in terms of gender equality. This implies that the ministries of finance and central banks are some of the most important government entities in implementing gender equality, while a direct way of achieving this objective is to carry out gender responsive budgeting.

In light of the above, the following conclusions can be drawn:

- ❖ The economic situation of the countries and increasing inequality throughout the world, requires review and substantiation of macroeconomic policies in terms of gender;
- ❖ Macroeconomic policies must support observance of economic and social rights of citizens;
- ❖ Promotion of progressive macroeconomic policies and avoiding austere fiscal policy;
- ❖ Review of the method of determining GDP (including by incorporating unpaid work) and macroeconomic indicators to reflect progress welfare in gender equality of society;
- ❖ Budget and tax policy, including policy on public borrowing and public debt is carried out through public budget. Thus, development and implementation of gender responsive budgets is inevitable as the main instrument for promoting accelerated gender equality in society.

8.2. Objectives and conditions for the implementation of gender responsive budgeting

When mainstreaming gender equality becomes a strategy agenda of the government programme, then its mainstreaming into the macroeconomic policy is inevitable. The decisions of the government on how to collect financial resources, through various methods of taxation and on their allocation to such areas as healthcare, education, pensions, investments in road construction etc., all of these have potential to increase or bridge the gap between the situations of women and men in society.

Budgets transform the government policy priorities and commitments at local, regional and national levels into practical actions. Within the efforts of the government to strengthen equality in society, it is important to take into account the commitment to promote gender equality in decision making on how the revenue collection is done and how revenues are spent.

Governments use public finance to exert influence on the national economy and the macroeconomic development as a whole. At the same time, the budget is a political instrument for the redistribution of national income, as the Parliament determines the annual fees, payments and other revenues collected from individuals and businesses, and establishes adequate distribution of resources by purpose. The reforms and programmes adopted by budget law affect the processes of formation and allocation of public funds for a longer period of time. Simultane-

ously, policies implemented through public budget have significant implications for everyday life of women and men, girls and boys.

Gender responsive budgeting is a generic term that describes how the policies of the country, region or municipality affect the distribution of resources between women and men, girls and boys.

A generally accepted definition of the concept of gender responsive budgeting given by the Council of Europe is as follows: “*Gender budgeting is the application of gender mainstreaming in the budgetary process. It entails a gender-based assessment of budgets, incorporating a gender perspective at all levels of the budgetary process, and restructuring revenues and expenditures in order to promote gender equality*”. The advancement of the current budgetary processes is a step forward by incorporating the gender perspective into their implementation.

Gender responsive budgeting should be viewed through two dimensions, and namely:

1. A process *subjected* to gender mainstreaming, as part of public policy in economic and social spheres;
2. A process *of transmission* through which gender equality is achieved in the socio-economic sphere for various beneficiaries.

The rationale for applying GRB lies in the following:

- ❖ It is a means or instrument for accelerating the strategy to promote gender;
- ❖ It is a better result-oriented approach;
- ❖ It is based on a continuous assessment, which allows for targeting new, higher performance objectives;
- ❖ It connects the equality policy with public finance management, by respecting gender equality, along with more efficient allocation of available resources;
- ❖ It is believed to be a way of ensuring accountability and transparency;
- ❖ It encourages and enhances civil society participation in governance;
- ❖ It consists in more effective policies and budgets with increased impact on respect for gender equality, on the situation of beneficiaries of grants, but also on the long-term economic and social development of the country.

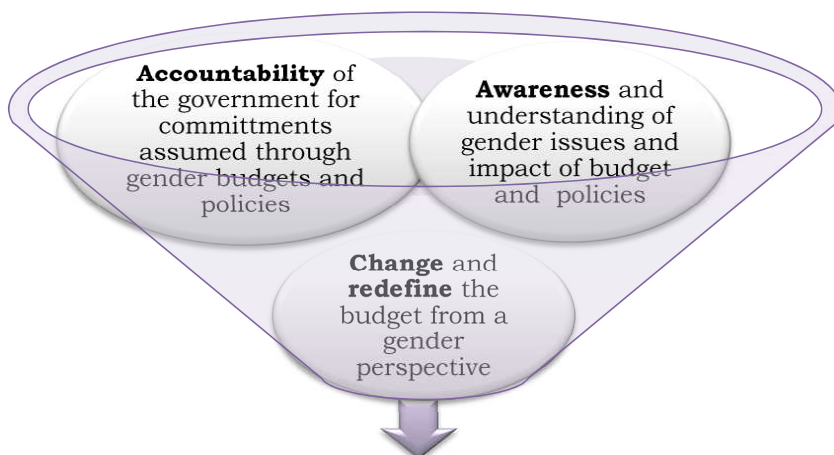


Figure 8.3. Objectives of starting and implementing gender responsive budgeting

Source: Sharp, R. *Budgeting for Equity: Gender Budget Initiatives within a Framework of Performance Oriented Budgeting*. New York, UNIFEM. 2003. p.10. Available at: <http://www.wbg.org.uk/sharp2003.pdf.pdf>

When referring to the budget process itself, we must take into account the specific rules and systems that depend on national preferences and characteristics. The essence of the **budgeting** concept is to find potential directions in allocating the limited financial resources and in determination of a specific decision making process, whilst ensuring balance. Budgeting in the public sector, in addition to the features mentioned above, includes a number of features of the budget process, namely: multiple participants with different interests and goals; vulnerability to circumstances; separation of taxpayers from those who take decisions on public expenditure; influence of political, social, natural, etc., constraints.

Budgeting in the public sector, as seen from the perspective of the decision making process, can be divided into microbudgeting and macrobudgeting.

Microbudgeting refers to the decision-making process from “bottom up” perspective, the attention being focused on a large number of participants with their own motivations and strategies to achieve the proposed objectives. However, a number of conditions or constraints of a different nature (circumstances, legislation, economic and social priorities, etc.) call for a systemic vision, for “top-down” budgeting, defined as **macrobudgeting**.

Addressing gender is initiated within the macrobudgeting process, the ultimate goal being the efficient mainstreaming into microbudgeting. However, achieving this aim requires the coordination of different actors at central government level and at the level of implementing structures. Because the range of services and areas covered by the public sector is very diversified, and the decision making processes in public institutions are very complex and involve many participants (Ministry of Finance, line ministries, central and local public authorities) **horizontal coordination and organization** is required by: establishing an inter-ministerial steering group; accountability of ministries on gender mainstreaming using their own capacities; coordinat-

ing the activities of local governments in implementing gender equality objectives.

Initiation and implementation of a gender mainstreaming approach to the budget process at all levels of government can be successful provided some activities are performed and certain **conditions** are observed:

I. Availability of a legal and regulatory framework that aims at promoting political demand and initiative for undertaking gender responsive budgeting.

II. Developing the institutional mechanism. In implementation of gender equality mainstreaming into the budget process the structures involved and their specificity must be taken account.

III. Economic governance of the public sector. The goal of economic governance (financial management and control) is to give politicians the necessary information for decision making in view of effective examination of public finances and distribution of resources in line with policy priorities. The national gender goals can be translated into specific concrete tax policies and expenditures only through the budget.

IV. Creation of an information basis for economic and social policies and programmes. The primary purpose is determined by the need to incorporate gender dimension in the information material based on which decisions are taken. Economic policies are developed based on analysis and information compiled in the form of reports, estimates and forecasts. They can be distribution analyses, long-term planning reports, as well as special documents, such as time-use studies on unpaid work.

V. Sex-disaggregated statistics. Implementation of gender responsive budgeting cannot be performed without statistics disaggregated by sex. Economic policy objectives often include quantitative terms, such as the ceiling for expenditure, savings of the public sector, employment and unemployment rates. The qualitative aspect can be assured only by official statistics reflecting the people (directly or indirectly) which needs to be collected, analysed and presented by sex. Applying these statistics in the information material for decision making is crucial to understanding sustainable social and economic development.

In addition to the above-mentioned conditions, implementation and achievement of gender responsive budgeting involves also the existence of: a decentralized public administration; public finance management based on objectives and results; an effective information and communication system between all participants in the budgetary process.

8.3. A mechanism for initiation and promotion of gender equality in macrobudgeting

The development of gender responsive budgets provides traceability of impact of the budget revenues and expenditures on socio-economic situation and opportunities of women and men and on gender issues in the country. GRB is an influential element of managerial work related to the development of budgets at different levels, which provides important information to the government for making decisions re-

garding the allocation of budget funds. Being regarded as an instrument of public finance management, the gender responsive budget analysis allows determining the state involvement through public policy in respect to different groups of men and women as consumers of public services, economic and social infrastructure users and taxpayers.

Simultaneously, GRB implementation requires a change in organizational processes and institutional structures. The use of GRB, as viewed from perspective of gender responsive macroeconomic policy and benefits for government, contributes to:

1. Promotion of gender equality, which is currently the main international approach to promote equality between women and men. Simultaneously, it helps the government to meet its national and international commitments on gender equality;
2. Improving links between economic and social policy outcomes, by directing public expenditures towards ensuring gender equality and achievement of development policy commitments;
3. Encouraging civil society participation in economic policy development by engaging the public in the budgetary process;
4. Improving and optimizing the budgetary process and planning and coordinating activities at macroeconomic level, such as prioritizing, planning, implementation management, monitoring and impact assessment;
5. Improving and supplementing the information base for decision making, reporting and evaluation by introducing new quantitative and qualitative statistical indicators;
6. Increasing the efficiency of public expenditure through the quality of programmes and services provided to beneficiaries: women, men, girls and boys;
7. Improving and revising the tax system, the tax incentives and loans;
8. Ensuring increased rates of regional and local economic development.
9. Regarded as a public policy instrument, the budget is deemed to be a financial mirror of government programmes.

Gender responsive microbudgeting assigns to the budget the quality of a *strategic policy* instrument. Gender mainstreaming in the budget process is a long-term exercise for analysis, monitoring and restructuring. It is a process of continuous improvement based on analysis of the objectives and the efficiency of public planned spending. At the same time, gender mainstreaming in the budget process requires an on-going commitment to understand and be aware of all aspects of gender, through impact assessment, analysis and consultation, and through operating on-going budgetary adjustments to take account of the changing needs of women and men.

Budget preparation is essentially a political exercise, based on the interests and priorities of the population. Schematically, GRB, regarded as part of public policy in economic and social spheres, can be formulated as follows:

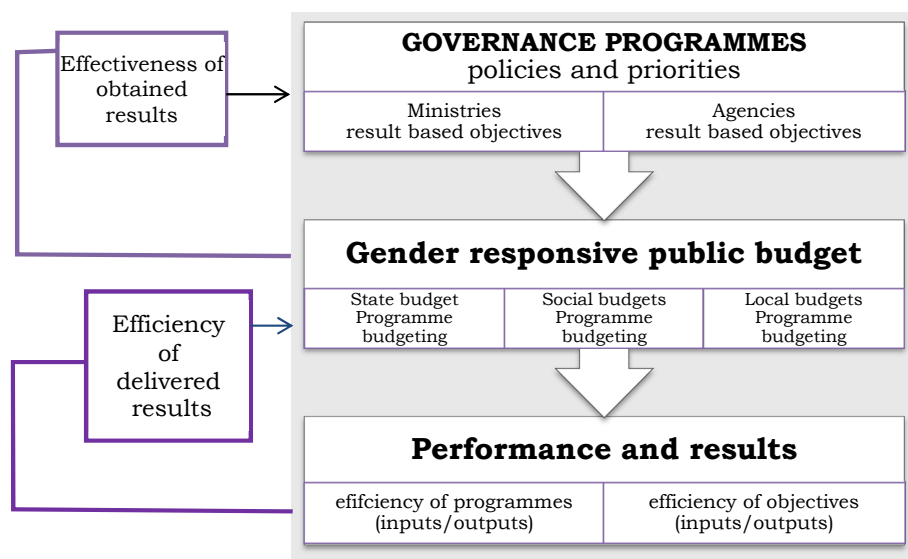


Figure 8.4. Gender responsive macrobudgeting

Source: Developed by the author based on: Sharp, R. *Budgeting for Equity: Gender Budget Initiatives within a Framework of Performance Oriented Budgeting*. New York, UNIFEM. 2003, p.35.; Quinn, Sh. *Equality Responsive Budgeting*, 2013, pp.38-48.

Gender mainstreaming involves systemic change of work practices to incorporate new approaches to everyday business processes, culture change so that gender considerations become customary³. However, this process is one of the most complex because of the political nature of the budget process and power relations that shape the budget.

Box 8.3.

Case studies regarding GRB initiatives

Australia:

First GRB initiative in the world.

The weakness was that the initiative was implemented only within the government.

The Philippines:

An example of institutionalizing GRB in the budget preparation procedures.

The complementary roles of government and civil society.

Using GRB to strengthen work on empowerment of women and policy at the local level.

³. Quinn, Sh. *Equality Responsive Budgeting*, 2013. p.44. Available at: http://wbg.org.uk/pdfs/erb_webversion_final_15052013.pdf

South Africa:

Opportunities provided by the policy change.

An example of comprehensive research coverage of all sectors, all levels and related sectors.

An attempt to extend the budgeting in macroeconomic modelling.

Tanzania:

An example of development of GRB by NGOs, which has spurred the government to consider its own budget from gender perspective.

Cooperation between government and NGOs and issues of autonomy which arise in this context for NGOs.

Attempt to extend budgeting to macroeconomic modelling.

UK:

An example of initiative at the level of academic / civil society community. Importance of serious research.

Opportunities for political change.

An example of work focused on taxes and benefits rather than costs.

Convincing arguments directed at specific auditors, such as the State Treasury.

Scotland:

Opportunities granted by political change.

Using existing networks and contracts.

Constraints for activities that had no funding.

Mexico:

An example of an alliance between an NGO, academic research and a public organization of women.

An example of focus on practical issues - reproductive and general health services.

Spreading the message both within government and in the local community.

Austria:

An example of GRB developed by an NGO, which has spurred the government to consider its own budget from the gender perspective.

Spreading the message both within government and in the community.

Failure to provide easy “recipes” for applying GRB.

Gap between analysis and incorporating findings in policies.

The Netherlands:

An example of GRB conducted at government level, which is incorporated in existing policies.

Role of the Parliament in accepting application of GRB by the government.

Pilot exercises as a way to start GRB.

Small funds allocated for

Resistance to the new type of implementation is dependent on existence of resistance and interest groups entrenched in the public expenditure management system. The government parties, ministers and elected officials may also be reluctant to implement changes and promote gender equality in exercising their authority. Therefore, adoption of formal political commitments on gender equality objectives can be insufficient to ensure significant change.

Implementing performance-based budgeting and gender mainstreaming result in changes in governance, operations, personnel, structures and even culture. These changes always lead to a struggle for power and power transfer and, therefore, to resistance of those that are adversely affected. Some civil servants do not feel the urgency to use indicators for measuring performance in budgeting; others see measurement performance as a threat to established budgetary procedures and processes⁴.

Currently, there are a number of tools, methodologies and materials regarding the initiation and implementation of GRB. The analysis of the practical toolkit in the experience of the European Union member states has led to presenting it in a systematic format by the international expert Sheila Quinn⁵, namely:

- three stages of gender responsive budgeting;
- two approaches to introducing gender responsive budgeting;
- a toolkit for implementing gender responsive budgeting.

⁴. Sharp, R. *Budgeting for Equity: Gender Budget Initiatives within a Framework of Performance Oriented Budgeting*. New York, UNIFEM. 2003. Pp.48-49. Available at: <http://www.wbg.org.uk/sharp2003.pdf.pdf>

⁵. Quinn, Sh. *Equality Responsive Budgeting*, 2013. p.38. Available at: http://wbg.org.uk/pdfs/erb_webversion_final_15052013.pdf

A. Three stages of gender responsive budgeting;

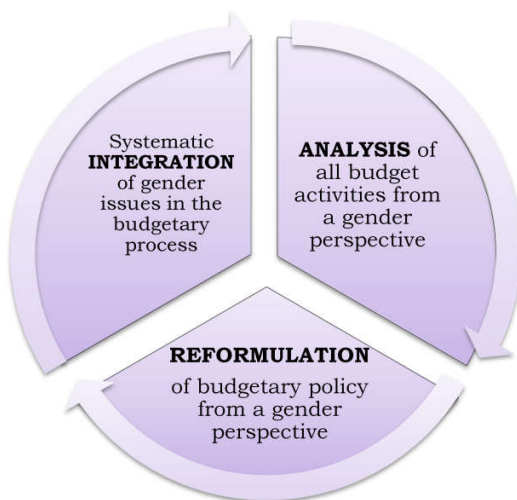


Figure 8.5. Stages of integration of gender issues in the budgetary process

Source: Quinn, Sh. *Equality Responsive Budgeting*, 2013. p.43.

Stage 1: Gender responsive analysis of all budget related activities in order to determine the differential impact of the budget on women and men.

Creation and continuous improvement of data systems not only accelerates promoting equality through better targeting of budgetary allocations, but also facilitates more efficient and effective use of public funds in general. In-depth research through gender responsive analysis can demonstrate the following:

- ❖ extent to which the budget meets the needs of beneficiaries;
- ❖ ways in which needs and roles of beneficiaries, differentiated in terms of gender, contribute to satisfaction levels;
- ❖ challenges and barriers faced by a particular target group, which has had no access to services;
- ❖ extent to which the budget has changed gender inequality (has reduced, has exacerbated it or the inequality degree remained unchanged);
- ❖ relationship between declared policies (in particular, gender equality policies) and budgetary decisions;
- ❖ why the budget must take into account the differing rates of participation women and men in care work.

Stage 2. Reformulation of public spending policy in order to obtain better gender equality results.

When gender-responsive analysis is used in budgetary decisions and in determining output indicators by reformulating budget lines, the gender equality strategy of the government is likely to be funded and implemented. At the same time, any accidental gender deviation can be identified and mitigated. If the distribution of

budget resources does not coincide with gender equality policies of the government, realignment or restructuring is necessary. In some cases, the restructuring may mean a positive action measure, a temporary additional spending line, which aims specifically at the identified problem.

Stage 3. Systematic integration of gender issues in all budgetary processes.

This stage is essentially a process of a complex approach to gender mainstreaming as a category of analysis in the development and execution of the budget. Gender responsive budgeting is aimed not only at the content but also at all phases of the process of budgetary decision making. These are: how budget decisions are taken, information base; decision makers and participants in the process, influencing decisions, as well as uninvolved persons. In essence, public expenditure management is a political process and not just a technical one. Thus, while the technical understanding of the phases of budget formulation and execution is necessary, understanding of political influence on the budget process is also important. In this context, the role of civil society in increasing the accountability of government plays a decisive role in minimizing political influences.

B. Two approaches to introducing gender responsive budgeting.

Approach 1 - Determine objectives in terms of gender equality as relevant to each sector / direction / geographic region, by evaluating costs and incorporating these objectives into the budget process (approach used in Austria);

Approach 2 - Systematic examination of all budget elements in terms of gender in order to make all necessary modifications to produce equitable outcomes (the approach used in Belgium).⁶

The strategic difference between the two approaches shows that in the first (setting goals on gender equality), the focus is on the current situation of gender equality in the sector and it identifies the directions for improvement (for example: What are gender imbalances in education? Are there more girls than boys at third level?). This sectorial analysis will lead to an understanding of the way in which gender inequality is expressed and, in turn, will identify measures and resources to improve the situation.⁷

The second approach is to assess the ability of each budget related activity in terms of achieving budgetary outcomes on gender equality. The rationale behind this approach is that:

- ❖ men and women (boys and girls) are the end users of policies and public services;
- ❖ gender mainstreaming is founded on the fact that public policies can have different impacts on men and women;
- ❖ budget is an instrument of public policy and budgeting activities can impact men and women differently; and

⁶ Quinn, Sh. *Equality Responsive Budgeting*, 2013. p.45. Available at: http://wbg.org.uk/pdfs/erb_webversion_final_15052013.pdf

⁷ Idem, p.46.

- ❖ all budgetary activities have the potential to affect equality between men and women⁸.

This approach can also be seen in terms of improved efficiency and effectiveness of public finance management. In general, such improvements can be achieved by continuously updating the profile of the target group of end users in terms of population size, geographic location and demographic and socioeconomic characteristics. As in the case of determining aspects such as age, ethnicity, disability, etc., different social and cultural roles of men and women in family and society should be found, all of these having an impact on their needs and on their expectations to the public service.

C. Toolkit for GRB implementation.

1. The Toolkit of the European Community Secretariat:

- ❖ Gender disaggregated assessment of beneficiaries of public services and budgetary priorities;
- ❖ Analysis of incidence of public spending disaggregated by sex;
- ❖ Assessment of fiscal policy in terms of gender;
- ❖ The budget document from gender perspective;
- ❖ Gender disaggregated analysis of the budget in term of time use;
- ❖ Mid-term economic policy framework responsive to gender;
- ❖ Analysis of incidence of public revenue disaggregated by sex.⁹

2. Methodology in 5 steps - South Africa;

3. The Circular on Gender Budgeting¹⁰.

Currently, many governments are implementing a reform of public finances and budgetary processes by introducing performance-based budgeting (PBB). The design and content of performance-based budgets aim at planning, implementation and monitoring of measurable indicators throughout the period of the budget process, focusing on criteria of economy, efficiency and effectiveness. Simultaneously, PBB offers a variety of options in its application at various levels in respect to implementation, progress and commitments. Among the key factors of PBB effectiveness the following are worth mentioning:

- Use of performance indicators;
- Focus on outputs and not on inputs;
- Use of the Medium Term Expenditure Framework.

⁸. Idem, p.48.

⁹. Idem, pp.55-59.

¹⁰. Idem, p.60.

Thus, gender mainstreaming in performance based budgets fits perfectly into the framework for management of public finances and, by contributing a gender analysis, it enhances the quality of public services by targeting beneficiaries, women and men, girls and boys, and contributing to overall economic growth and social development.

Finally, it should be underlined that within strategies of the developed countries, and through the rationale of development of national economies, accentuated trends exist related to sustainability of any actions taken by the government, which are centred on the needs of individual members of the society, as incorporated in maintaining the necessary environmental conditions. In this regard, the statement made by Sh. Quinn, that “gender responsive budgeting provides a people-centred approach to the substantiation and execution of the national budget¹¹” is part of the future development trend of societies.

Checklist

1. ***For which reasons macroeconomics may have a different impact on women and men?***
2. ***Describe the existing interconnections between the main objectives of macroeconomic policy and gender equality.***
3. ***Describe the connection between macroeconomic policy and social policy based on human rights.***
4. ***What are the main principles and obligations relevant to the assessment of macroeconomic policy from the human rights perspective?***
5. ***Which policies are used to ensure the principle of maximizing available financial resources?***
6. ***Explain the influence of macroeconomic policy as part of the structural adjustment programmes or poverty reduction strategies on the situation of women and girls.***
7. ***Which indicator should be used in a gender responsive macroeconomic model?***
8. ***Describe the main principles to be followed in the process of gender mainstreaming.***
9. ***Define the concept of “gender responsive budgeting”, as adopted by the Council of Europe.***
10. ***Which dimensions reflect the content of gender responsive budgeting?***
11. ***What are the arguments in support of achieving gender responsive budgets?***
12. ***Specify the objectives of initiating and implementing gender responsive budgeting.***

¹¹ Quinn, Sh. *Equality Responsive Budgeting*, 2013. p.15. Available at: http://wbg.org.uk/pdfs/erb_webversion_final_15052013.pdf

13. *How can we delineate gender responsive budgeting through decision-making?*
14. *What activities should be implemented and which conditions should be met to initiate and implement mainstreaming of gender equality into the budgetary process at all levels of public administration?*
15. *How gender responsive budgeting can benefit the governance and improve the effects of budgeting?*
16. *Describe the circuit of gender responsive macrobudgeting.*
17. *What are the stages of integration of gender issues in the budgetary process?*
18. *What is the essence of and the difference between the two approaches to initiating gender responsive budgeting?*
19. *Outline the existing toolkit in GRB implementation.*
20. *Outline a few advantages of GRB implementation related to the implementation of public finance reforms by introducing performance-based budgeting.*

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Topic 9. GENDER-SENSITIVE POLICY ASSESSMENT AND BUDGET ANALYSIS

Keywords: *gender impact assessment, gender analysis matrix, gender audit.*

9.1. Gender Impact Assessment as integral part of the gender integration process

As part of the Government's gender mainstreaming activity, Gender Analysis may change organizations' mode of operation so that they become more gender-sensitive by approaching women and men in an inclusive manner. Although gender equality policies are meant to address women's specific problems, they often constitute a rather discrete part of the Government's overall activity and tend to remain so in relation to the main programmes. Gender Analysis highlights the need to address all policies and programmes according to their gender impact.

Gender Impact Assessment should be carried out once it is established that a certain policy or a certain programme/project has implications for gender relations. It is most successfully carried out in the early stages of the decision-making process, or the early stages of developing and planning policies/programmes/projects. Gender Impact Analysis can, however, be introduced after the development phase or any time of a policy/programme/project's effectiveness. When appropriate, the Gender Impact Assessment can also contribute to a major reorientation of ongoing policies.

Gender Impact Assessment means to compare and assess, according to gender relevant criteria, the current situation and trends with the expected development resulting from the application of the proposed policy.

Policies, projects and programmes which appear to be gender-neutral may in fact impact differently on women and men, even when such effects are neither expected, nor envisioned.

Gender Impact Assessment (GIA) is an ex-ante or parallel method carried out in order to prevent unintended negative consequences of policies and prompt intended positive gender equality outcomes. GIA is a legal tool that supports political decision-makers in implementing efficient quality/equality policies by better targeting their output.

Gender Impact Assessment is an ex-ante analysis or assessment of a law, policy or programme that makes it possible to estimate in a preventative way the likelihood of a given decision to have positive, negative or neutral consequences for the state of equality between women and men. The central question of the GIA is: Does a law,

policy or programme reduce, maintain or increase the gender inequalities between women and men?

GIA can also serve as an ex-post evaluation tool, picking up on intended or unintended gendered effects. GIA aims to detect disparities and degrees of difference in policy, project or programme induced consequences. It seeks to avoid negative consequences for either gender, especially for the contextual underprivileged one. It also strives to stimulate and enhance positive consequences. GIA requires the fundamental distinction between sex (biological/physical) and gender (roles, norms, stereotypes, identity).¹

Thus, the assessment involves a dual approach: the current gender-related position in relation to the policy under consideration, and the projected impacts on women and men once the policy has been implemented. It is important that the assessment is structured; that is to say systematic, analytical and documented.

Gender Impact Assessment is intended to avoid unexpected negative consequences and to allow implementation of effective and efficient policies. In this context, GIA serves as an indispensable tool for implementing provisions of strategic development documents at global, regional, and local levels.

The European Commission² defines Gender Impact Assessment as follows: “Gender impact assessment is the process of comparing and assessing, according to gender relevant criteria, the current situation and trend with the expected development resulting from the introduction of the proposed policy.

Gender impact assessment is the estimation of the different effects (positive, negative or neutral) of any policy or activity implemented to specific items in terms of gender equality.”

The final aim of the GIA is to improve the design and the planning of the policy under consideration, in order to prevent a negative impact on gender equality and to strengthen gender equality through better designed projects, legislation and policies. A primary objective is to adapt the policy to make sure that any discriminatory effects are either removed or mitigated. Beyond avoiding negative effects, a GIA can also be used in a more transformative way as a tool for defining gender equality objectives and formulating the policy so as to proactively promote gender equality.

Below are listed the steps for policy impact assessment as a stand-alone tool, designed on the basis of “Better Regulation Guidelines”³ published by the European Commission’s DG for Employment, Social Affairs & Inclusion (EMPL):

Step 1. Pre-test of Checking Gender Relevance

The key and the basis for identifying gender relevance is to obtain sex-disaggregated data and to ask the following two questions:

1. Does the proposal concern one or more target groups? Will it affect the daily life of part(s) of the population?

¹. <http://www.liaise-kit.eu/ia-method/gender-impact-assessment-0>

². <http://eige.europa.eu/gender-mainstreaming/tools-and-methods/gender-impact-assessment>

³. http://ec.europa.eu/smart-regulation/guidelines/toc_guide_en.htm

-
2. Are there differences between women and men in this policy field (with regard to rights, resources, participation, values and norms related to gender)?

If the answer to any of these two questions is positive, gender is relevant to the issue under consideration.

Step 2. Full-fledged Gender Impact Assessment

A full-fledged GIA of the policy, programme or project will **first** contain an analysis of differences between women and men in the area of strategies/policies under analysis, such as:

- *Participation* (sex-composition of the target/population groups, representation of women and men in decision-making positions);
- *Resources* (distribution of crucial resources such as time, space, information and money, political and economic power, education and training, job and professional career, new technologies, health care services, housing, means of transport, leisure);
- *Norms and values* which influence gender roles, division of labour by gender, the attitudes and behaviour of women and men respectively, and inequalities in the value attached to men and women or to masculine and feminine characteristics;
- *Rights* pertaining to direct or indirect sex-discrimination and general human rights, including freedom from sexual violence and degradation, and access to justice, in the legal, political or socio-economic environment;

Secondly, the analysis will progress to answering the question: “How can the policy, programme or project contribute to the elimination of existing inequalities and promote equality between women and men; e.g. in participation rates, in the distribution of resources, benefits, tasks and responsibilities in private and public life, in the value and attention accorded to male and female, to masculine and feminine characteristics (stereotypes), behaviour and priorities?”

Gender Impact Assessment can be employed in three ways: 1) as an add-on or 2) stand-alone tool or 3) in an integrated fashion. When applied add-on, it is compatible with other IAs (e.g. integrated IA, sustainability IA, social IA, environmental IA, trade IA, poverty IA – even economic IA and financial IA) and adds to their analysis. When applied in an integrated fashion, gender concerns are mainstreamed throughout all steps and processes of the respective IA tool, and as such constitutes the *gender mainstreaming approach*.

The main steps to conduct a Gender Impact Assessment are⁴:

Step 1: *Definition of policy purpose*, to produce a precise definition of the purpose of the planned policy or legislative intervention.

Step 2: *Checking gender relevance*, to determine its gender relevance. This

4. Ibidem.

involves analysing whether it is or not susceptible to impact on gender equality.

Step 3: *Gender-sensitive analysis*, which has a double focus. On the one hand, it should aim at understanding the present situation for the groups concerned by the public intervention and how this situation would evolve without public intervention. On the other hand, the analysis should include, to the extent possible in measurable terms, a prospective dimension: how is the planned intervention expected to change the existing situation.

Step 4: *Weighting the gender impact*, establishing how the policy or legislative measure will contribute to gender equality, as well as assessing the foreseen impact in gender relations.

Step 5: *Findings and recommendations for the policy/legislative options*. In this last step, the results of the analysis are presented and the impacts (positive or negative) of the policy/legislative initiative are highlighted. Recommendations on how to eliminate negative impacts and on how to enhance the positive ones are presented.

In developed countries, the most substantial experience in this field is found with 'Participatory Poverty Assessments' – PPAs⁵, first described by Andy Norton in 2001, which may be defined as an instrument to include poor people's perspectives in the analysis of poverty and in the formulation of strategies to alleviate poverty through public policy. PPAs have become the most widely used method of including citizens' views in the Poverty Reduction Strategy introduced as a policy framework aimed at channeling financial resources and access to aid for debt repayment in poor countries.

A **model for carrying out the Gender Impact Analysis**⁶ is given in the "Gender Impact Assessment Handbook" produced by Marie Crawley and Louise O'Meara under auspices of the Office of the First Minister and Deputy First Minister of Northern Ireland and which recommends using a four-step process. The four-step Gender Impact Assessment tool is essentially a set of four questions which should be answered in relation to any objective/action the department/organisation is planning to undertake.

The answers to these questions should then be integrated into the appropriate sections of the department's/organisation's strategic planning document.

First of all, this requires gathering any available gender disaggregated statistics, facts and information on the issue being addressed by the action/objective. This will enable to give an accurate response to Step 1 and to set realistic targets and indicators. At the same time, it is needed to consult with women and men who are likely to be affected by the outcome.

⁵. "A rough guide to PPAs" Participatory Poverty Assessment, An introduction to theory and practice, Andy Norton, Bella Bird, Karen Brock, Margaret Kakande, Carrie Turk, <http://info.worldbank.org>.

⁶. Gender Impact Assessment Handbook, Marie Crawley and Louise O'Meara, 2004.

Steps for carrying out the Gender Impact Analysis

| Step | Questions |
|---------------|--|
| Step 1 | What do we know to be the different experiences, situations and roles of men and women which might impact on how they get involved in/ are affected by this action? Use statistics and data when available. |
| Step 2 | What are the implications of these for the action being assessed? |
| Step 3 | <p>a. Given these implications, what do we need to do when pursuing this action to promote equality of opportunity for men and women?</p> <p>b. If any of the implications identified above are ‘macro issues’ what can you do within the scope of your job to progress action in this area?</p> |
| Step 4 | <p>a. What indicators will you use to measure success?</p> <p>b. What are your targets in relation to each of these indicators?</p> |

Source: Prepared on the basis of “Gender Impact Assessment Handbook”, Marie Crawley and Louise O’Meara, 2004.

In completing the four steps, it is important to consider the following:

- Many people are much more familiar with the process of planning than with the process of Gender Impact Assessment. Therefore there can be a temptation to work through the objective or action itself rather than focus on the gender dimension to the objective/action. It is crucial to retain the focus on gender throughout. The focus on the differences in the lives of men and women is what distinguishes the gender impact assessment process from a regular planning one.
- It is important to answer the first question as accurately as possible, as the response to it will set the entire “gender agenda” for the implementation of the objective. In some instances, where statistical information is unavailable, there will be a reliance on local knowledge.
- Each stage of the process is predicated on responses to questions at the previous stage. Therefore, although it may seem obvious, it is important to read through all the questions first, become familiar with each and ensure that when working through the process that responses are to the immediate question only.
- The differences in the lives of women and men, in particular those which contribute to inequalities, are part and parcel of everyday experiences. The solutions in themselves can often be straightforward and based on a creative common sense approach to alleviating potential inequities.
- Nonetheless it is acknowledged that the most obvious solutions can sometimes be the most difficult to implement. It is important therefore to set realistic targets and to adopt a phased approach to implementing a solution.

- At times, there will be issues identified in the area under analysis, which will require responses at national as well as departmental/agency level; it may be necessary to include actions which will help to effect change at both these levels.

9.2. Tools and models for gender-sensitive budget analyses

There is no single, uniform methodology for doing gender budgeting. The analytical-methodological approach as well as the tools and instruments applied in a specific gender budgeting exercise depend on several factors:

- the structure of budget revenues or expenditures;
- the side of the budget to be examined;
- the time horizon used in the analysis;
- the concrete questions guiding the gender budgeting analysis⁷

Up to now, analyses have mainly focused on the expenditure side of public budgets, although taxes similarly exert differing effects on both men and women. The reason lies not only in the various methodological issues and data restrictions, but also in the fact that there may be certain political hindrances in the analysis of revenues. Therefore, gender-disaggregated analyses of public revenues often remain at a very basic or general level.⁸

While the gender budget analysis has much in common with other forms of equality analysis of budgets, it is useful to keep in mind the following **two principles in doing gender budget analysis**, which do the most to distinguish it from other analyses.

Assessment on an Individual as well as a Household Basis. It is important to assess the budget from the point of view of poor households as compared to rich households. But it is also important to look within households and assess the budget from the point of view of individual women and men, recognising that although households do share some resources, this is often done in ways that are incomplete and inequitable. Only if budgets are informed by individual as well as household assessment of likely impacts can women be treated as citizens in their own right and not merely as dependants of men. Only this will ensure that the budget is not based on incorrect assumptions such as that all income coming into a household is pooled and equally shared by all members of the household.

Systematic Recognition of the Contribution of Unpaid Care Work. The extent to which a country achieves its social and economic objectives depends not only on

⁷ Margit Schratzenstaller. Gender Budgeting in Austria. Munich: Institute for Economic Research at the University of Munich, Vol 6, No 2, 2008, 46.

⁸ Cecile Greboval and Katrin Hugendubel. Gender budgeting: An overview by the European Women's Lobby. European Women's Lobby, 2004, 10.

the amount of paid work its people do, but also on the amount of unpaid work its people do caring for their family members and neighbours, and upon the amount of free time people have for leisure and for civic activities. Unpaid care work is still unequally shared between women and men in most countries and this is one of the major obstacles to equality in paid work and to the full development of the talents of both women and men. A key dimension of a budget's impact on gender equality is the impact on the amount of unpaid care work that has to be done. It is especially important to look at this in the context of expenditure cuts and reforms which are expected to improve effectiveness and efficiency of public finance management.

For the gender analysis of a budget, several tools have been developed, which are not a blueprint, do not need to be used completely, and certainly should be adjusted to country contexts. Below, these tools, distinguished by pre-budget (revenue) and post-budget (expenditures) process, are presented together with the key question they want to address.

A. Tools for Analyzing Budget Revenues

There has been little progress in developing tools for analyzing the gender impact of government revenues. Future development of these tools is likely to focus on direct taxes (e.g., income tax), indirect taxes (e.g., sales tax), and user fees:

Box 9.2

Tools for Analysing Budget Revenues

| Tool | Description | Question |
|---|--|---|
| Gender-disaggregated tax incidence analysis | This research technique examines both direct and indirect taxes in order to calculate how much taxation is paid by different individuals or households. The impact of direct taxes requires disaggregating the data by taxpayer. Gender-disaggregated consumption data can be used to analyse the impact of indirect taxes on women and men. | How are women and men affected differently by the kind of revenues raised by governments such as direct (income, corporate taxes) and indirect taxes (value added tax)? |
| Gender-disaggregated analysis of user charges/fees | This tool tracks the impact user fees have on women and men. Given that women generally earn less than men, these fees can affect women differently than men. | How are women and men affected differently by user charges/fees? |

| | | |
|---|---|--|
| Gender-disaggregated analysis of the government's debt | The differential impact of a government's debt is the most difficult to estimate. | How will future debt burden be borne by women and men? |
|---|---|--|

Source: *Making Budgets Gender-Sensitive: A Checklist for Programme-Based Aid*, available from http://www.entwicklung.at/fileadmin/user_upload/Dokumente/Publikationen/Downloads/Themen_DivBerichte/Gender/CHECKLIST_12032009_barriere.pdf

B. Tools for Analysing Budget Expenditures

Budget expenditures have been and continue to be the target of budget analysis, due to the direct and measurable impact that they have on beneficiaries. The major problem, however, lies in the ability to accumulate gender-disaggregated budget data.

Box 9.3

Tools for Analysing Budget Expenditures

| Tool | Description | Question |
|---|--|---|
| Gender-disaggregated public expenditure incidence analysis | This research tool compares public expenditure for a given program to reveal the distribution of expenditure between women and men, girls and boys. | How are women and men benefiting from expenditure on public services, e.g. education, health units or agricultural extension services? |
| Gender-aware policy appraisal | This tool questions the assumption that policies are “gender-neutral” in their effects. | In what ways are the policies and their associated resource allocations likely to reduce or increase gender inequalities? How do policies and programmes reflect women’s and men’s different needs and priorities? Are women’s rights as stipulated in the CEDAW and mentioned in the country-specific CEDAW re-commendations taken into account? |
| Gender-disaggregated beneficiary assessments | This tool is used to ask actual or potential beneficiaries from both sexes the extent to which government policies and programs match their priorities or needs. | |
| Gender-disaggregated public expenditure benefit incidence analyses | | How are women and men benefiting from expenditure on public services, e.g. education, health units or agricultural extension services? |

| Tool | Description | Question |
|--|---|--|
| Gender-disaggregated beneficiary assessments of public service delivery and budget priorities | | How do public investments in infrastructure and the provision of public services address women's and men's different needs and priorities? |
| Gender-disaggregated analysis of the impact of the budget on time use | This tool looks at the relationship between the national budget and the way time is used in households. This tool ensures that the time spent by women in unpaid work is accounted for in policy analysis. It relies on time use studies implemented at the national level. | How do expenditures impact differently on women's and men's time use? |
| Gender-aware budget statement | This tool requires a high degree of commitment and coordination throughout the public sector as ministries or departments undertake an assessment of the gender impact of their line budgets and how expenditures affect gender equality using a variety of indicators. | Does the government provide information on the actions to reduce gender inequalities in the annual budget statements? |

Source: *Making Budgets Gender-Sensitive: A Checklist for Programme-Based Aid*, available from: http://www.entwicklung.at/fileadmin/user_upload/Dokumente/Publikationen/Downloads/Themen_DivBerichte/Gender/CHECKLIST_12032009_barriere.pdf.

At international level, the practice of applying the gender methodology is based on Rhonda Sharp's categorization of budget expenditures.⁹ The breaking down into three separate categories, as designed by Sharp, is based on a model used in South Australia in the 1980s. It helps applicants recognize that while Category 1 provides the opportunity for affirmative action, and Category 2 promotes employment equity and women's participation in decision-making, Category 3 is the most important if we are interested in gender mainstreaming. This same methodology is used annually to analyze gender budgeting in terms of execution and not in terms of its preparation.

The budget is broken down into three categories that together make up 100% of the budget:

⁹ Bocioc Florentina and others, "Gender Mainstreaming, Methods and Instruments", Practical Guide on Mainstreaming Gender Equality, CPE 2004.

Categorization of budget expenditures as per Rhonda Sharp's model

| 1st Category | 2nd Category | 3rd Category |
|---|---|--|
| Targeted gender-based expenditures of government departments | Equal employment opportunity expenditure on government employees | General / mainstream budget expenditure judged on its impact on women and men, girls and boys |
| Recruitment expenditures; | Training for clerical officers or women managers; | Analysis of gender-neutral budgetary destinations and of consequences that such expenditure has for women/men, girls/boys. |
| Women's health programmes (payment of maternity and child-bed allowances); | Provision of crèche facilities; | Who benefits from state investment budget allocations? |
| Special education initiatives for girls; | Parental leave provisions; | Who needs adult education and how much is spent on it? |
| Employment policy initiatives for women (support from women's NGOs and other social initiatives). | Facilities for women with children who supplement their qualifications; | Who are the users of clinic services? |
| | Tax breaks/incentives for enterprises that provide services that facilitate work from home. | Who receives agricultural extension services? |

Following on from the functional and programme classification of budgeted and actual expenditure, one could calculate indicators for planned and actual expenditure, such as:

- Share in total expenditure of expenditure explicitly targeted to promoting gender equality;
- Share in total expenditure of expenditure devoted to public services prioritised by women;
- Share in total expenditure of expenditure devoted to income transfers prioritised by women.

However, indicators of shares do not tell us whether real expenditure per capita has been rising or falling. There is also need to look at indicators of activities, outputs and impacts. One possible indicator is gender equality in participation in activities undertaken by several ministries. For example:

- ❖ Gender balance in enjoyment of support for business (eg. subsidised credit);
- ❖ Gender balance in enjoyment of training provided for members of the public;

- ❖ Gender balance in bodies making decisions about utilisation of resources.

It would also be useful to have some measure of levels of satisfaction of men and women with the services provided. Participatory processes have an important role to play here.

It would also be possible to take the line item classification of the budget as a point of departure, and construct gender-sensitive indicators of expenditure on and participation in public sector employment and public sector purchase of goods and services from the private sector. For example:

- ❖ Gender balance in public sector employment (eg. share of women in employment at each grade; average cost of female employees compared to average cost of male employees);
- ❖ Gender balance in public sector contracts with private sector (eg. share of women-owned businesses in total number and value of contracts).

Such indicators recognise that the public sector can promote gender equality as a purchaser as well as a provider.

A range of tools were developed to link budgets to policies with the goal of establishing political influence on gender equality. Some of the tools include:¹⁰

- *Gender-disaggregated revenue incidence analysis* estimates the amount of direct and indirect taxes, as well as user fees charged to men and to women. Due to different social roles and socioeconomic status of men and women, different ways of gathering data may lead to significant gender inequalities. For example, since women's incomes are generally lower, decreasing income taxes more positively affects men. In addition, decreases in minimum wages or personal revenues have a stronger negative consequence on women's incomes. The value added tax is a digressive tax, since it has a greater allotment with a person with a lower income. In other words, the increase of the value added tax has a more negative impact on women than men. The analysis of the influence of public revenue on men and women requires availability of information on public revenues and the users of public services. Therefore, the cooperation of the Ministry of Finance and the National Bureau of Statistics is crucial for the development of this instrument. The instrument itself is simple to use and should be used by the Ministry of Finance in gender budgeting, as well as other ministries included in providing certain services.
- *Gender-disaggregated expenditure incidence analysis* uses comparison of public expenditure on a certain programme to determine the distribution of expenditures between men and women. One of the fundamental roles of the state is an equal resource distribution. It is traditionally assumed that public expenditure is being equally distributed to various users. However, that is often not the case and public resource distribution is

¹⁰. Making budgets gender-sensitive: A checklist for programme-based aid, http://www.entwicklung.at/fileadmin/user_upload/Dokumente/Publikationen/Downloads_Themen_DivBerichte/Gender/CHECKLIST_12032009_barriere.pdf

uneven between rural and urban citizens, wealthy and poor ones, and men and women. This tool determines the unit cost of providing a certain public service, e.g. the cost of attending the first year of undergraduate studies, which is followed by determining the number of male and female first-year students of undergraduate studies. Finally, by multiplying the number of female and male students with the unit cost, it is possible to determine the amount of public expenditure used on the first undergraduate year on men and on women.

- *Gender-disaggregated beneficiary assessment* is an analysis tool used to ask actual or potential beneficiaries about the extent to which government programmes, as well as public goods and services match the needs, wants and priorities of men and women. Men and women's opinion on public revenues is obtained by using various methods, such as opinion polls, various surveys, focus groups or interviews. These are conducted by specialised state- or privately-owned organisations which use them to identify different priorities and needs of men and women.
- *Gender-disaggregated analysis of the impact of the budget on time use* is a tool to identify the influence of national budget to the amount of time a women uses for unpaid household labour and social reproduction. The latter is firmly linked to economic growth, since its decline leads to the erosion of human and social capital, lower productivity and health, stress increase, as well as increased expenditure on social and community workers and security services. Both men and women contribute to social reproduction, although women's contribution is far greater, which places them in an unfavourable position in comparison to men. Therefore, while producing the budget the government also needs to take into consideration the unpaid labour and find a way to quantify it, with the help of the National Bureau of Statistics.

9.3. Linking gender analysis with budgeting process stages

The focus on budgets is seen as a way to check how far a state's general policy has progressed toward implementing gender equality and women's rights, particularly in the case of poor countries. Since 1997, the United Kingdom Secretariat has provided five countries with support in carrying out gender-aware analyses of budgets and services of selected ministries. A notable feature of this initiative was the leading role of the Ministry of Finance in each country. In South Africa, the key role was again played by leading structures of the WBI that were engaged in performing several analyses. Although having successfully conducted the analyses, it was difficult to ensure the Ministry of Finance's permanent commitment to institutionalize and use them for improving budgets, policies and programmes in the five countries.

Regarding the gender budgeting implementation process, the European Council¹¹

¹¹. COE. Gender budgeting: practical implementation. Strasbourg: Council of Europe, 2009, accessed October 10 2012, http://www.femtech.at/sites/default/files/Gender_budgeting_-_practi

notes that: “Gender budgeting involves three clear sets or stages of activities:

- Stage 1: Analysis of the budget from a gender perspective;
- Stage 2: Restructuring the budget based on gender analysis;
- Stage 3: Mainstreaming gender as a category of analysis in the budgetary processes.”

In the first stage, which analyses the budget from a gender perspective, the influence of public revenue and expenditure on men and women is analysed. Such an analysis shows just how much the budget has satisfied the different needs of women and men, does the budget exacerbate, reduce or have a neutral effect on gender inequality and the reasons for the budget to take into account the different ratio of women and men participating in unpaid household work, i.e. the care economy. This stage heavily relies on data, especially gender differentiated data through which it is clearly seen how customs duty, taxes, education, employment and economic policies influence men, and how women.

Some activities within the framework of the public sector, such as healthcare and education, already gather information on the exact number of men and women using their services, although they might not always publish them. In some fields data is collected, but not gender-differentiated, which requires additional changes, whilst data on some important questions required for monitoring of government programmes, projects and the budget is not even being gathered. In order to move away from mere speculation, gender-differentiated data needs to start being gathered for all the areas covered by public revenues or expenditure.

International organizations that promote gender responsive budgeting, in the person of Diane Elson, a professor at the University of Essex (UK), have proposed five steps to frame GRB within public management activity. These five steps are the foundation of a fair analysis of the budget in terms of gender-responsiveness, regardless of whether it is carried out from inside government or outside – by NGOs, trade unions, employers and other organizations and public associations.¹²

Box 9.5

Steps for Integrating Gender-Sensitive Budgeting within Public Management

| Step | Characteristics of activities |
|--|---|
| Step I. General analysis of the situation | Involves studying the fundamental principles of budget preparation and implementation, as well as budget system operation. The basic step, without which is impossible to continue implementing the gender-responsive budgeting methodology in an efficient manner. |

[cal implementation.pdf](#), 16.

¹² Elson, Diane „Gender Responsive Budget Initiatives: Some Key Dimensions and Practical Examples”, Paper presented at the conference on „Gender Budgets, Financial Markets, Financing for Development”, February 19th and 20th 2002, by the Heinrich-Boell Foundation in Berlin.

| Step | Characteristics of activities |
|--|--|
| Step II. Policy/programme analysis within a given sector | <p>Broadly speaking, the step that serves to highlight the gender implications of the budget policy being promoted.</p> <p>Many reforms are currently underway: administrative, social, fiscal, of interbudgetary relations, but also in the areas of land, education, health, insurance, social assistance, etc. Social (gender) effects should be appropriately analysed to make clear who will bear and pay a higher price for these reforms (considering that, under current conditions, a large number of persons in question will be women with children from budgetary families: health workers, teachers, etc.) and make known from the very beginning if the state provides for compensation for these losses – in what form and how effectively?</p> |
| Step III. Analysis of opportunities /expenditure prioritization | <p>This step involves analysing decisions taken with regard to funding and prioritizing expenditures and can be completed only if ongoing quantitative and qualitative accumulation of statistical and sociological information on gender-sensitive areas is ensured. The key issue lies in the quantity and quality of information during early GRB implementation.</p> |
| Step IV. Analysis of funding absorption | <p>After completing steps I-III, we arrive at the most important and complicated step that involves evaluating the correspondence of the social policy promoted with its financial backing.</p> |
| Step V. Analysis of policy and expenditure impact | <p>After evaluating the budget (expenditures) and normative acts (policies) governing a given system, we reach the step where proposals for qualitative and quantitative changes must be made to the situation (based on international experience, historical background, analogies, outputs of recent research in the field).</p> |

The tools listed above are mostly methods of ex post analysis of the budget that can indicate to certain hidden gender inequalities and indicate a need to reformulate or shift some priorities of government policies and programmes. The results of such analyses are also used as arguments for the implementation of gender budgeting and gender perspectives in each of the following stages of the budgeting process.

In the preparation and planning stage the most important role is the one played by the Ministry of Finance. In this stage the goals of gender budgeting and adequate indicators for determining direct influence and policies are defined within the process of gender budgeting. Some of the tools that can be used in this stage are *Gender aware medium-term economic policy framework* and *Gender aware policy appraisals*. Most countries use these tools as bases for budget planning and preparation, so the implementation of gender budgeting would consist of incorporating a gender perspective in the current processes.

Gender-aware medium-term economic policy framework is a means of incorporat-

ing a gender perspective into economic and social policies on which medium-term economic frameworks are based. This medium-term economic policy tool defines the objectives, economic surrounding and resources available in the period of the following three years. By integrating gender analyses in medium-term economic policy frameworks, the influence of economy policies on women can be evaluated, focussing on fiscal, monetary or social policy, etc.

Programme- and performance-based budgeting is an indispensable ex ante tool of gender-sensitive budgeting. It is also an essential parts of planning and preparing a budget of most countries, representing the most appropriate means of providing not just quantitative but also qualitative information on the allocation of financial resources according to established objectives.

Gender equality should be considered one of the goals to be attained through budgetary measures. Although budgets cover periods of one year, programmes refer to short, medium and long-term aims, and, thus, enable tracking the progress towards achievement of policy and strategy objectives. Programmes of budgetary objectives also serve as a basis for auditing and evaluation: precise formulation and quantification of objectives are important steps for tracking implementation of programme budgeting objectives. All these activities should be carried out in the context of an ongoing benchmarking process so that by determining improvements and where appropriate to implement, as well as by analysing how other countries achieve high levels of performance, we could use the information to improve performance budgeting in our country.

The benchmarking process begins by establishing reference points which would be used to specify the effects of budgetary changes. In other words, this stage involves the development and specification of indicators representing core dimensions of gender relations, which then serve as a standard for determining the consequences of budget measures. During that process, it creates a link between the budgetary changes cycle and particular social phenomena, which constitutes an important prerequisite for budget evaluation. Therefore, the chosen indicators will reflect the effect of budgetary objectives programme.

In the budget adoption stage parliament members contribute to the process of gender budgeting by requesting methods and tools for gender budgeting for the whole of the budget.

During the implementation stage legal provisions are followed; however, implementation necessarily involves decision-making processes. In this stage it is important to ensure that these decisions take gender equality into account and that they are in accordance with gender-aware policy frameworks. This stage also involves lower-level authorities, their administration and budget users, so allocation of public money from central to local government should always contribute to gender equality.

Instructions and guidelines for implementation of gender budgeting should be available to all participants involved in the process, since they clarify the importance of gender equality, compared to other goals and implementation methods. They give guidance on incorporating a gender perspective into each stage of the budgeting process. Aside from instructions and guidelines, the participants of gender budgeting should have access to specific gender training in order to fully under-

stand previous processes, as well as their role in the process. Such gender training ensures that the implementation of gender budgeting is conducted in accordance with the specified gender equality objectives of the budget.

It is important to implement the processes of monitoring and auditing of budget expenses in all stages of gender budgeting, as they ensure legitimate, proper and duly usage of budgetary resources. Budget auditing ensures proper interpretation of budgetary objectives, taking into account gender equality objectives determined in the process of budget production, and it mainly focuses on efficiency. At this stage, gender budgeting includes assessing effectiveness and efficiency from a gender equality perspective, based on gender-specific goals and indicators previously set in the framework of gender budgeting. This process establishes gender equality as an additional auditing criterion for distribution of public funds.

Evaluation and auditing are crucially important for future budgeting processes. The evaluation of gender budgeting requires guidelines and instructions which provide information on how to conduct the audit and evaluation of the budget and its impact on gender equality. Those guidelines ensure adequate interpretation of budgetary objectives, using gender equality as a reference point. Guidelines, both for implementation and evaluation, relate gender equality to other aims and principles, therefore setting clear priorities. Strict guidelines for auditing and evaluation both help the participants involved in the process of gender budgeting, and also guarantee high-quality gender aware budget statements.

Gender budgeting assessment should be carried out as part of the budget implementation report, which reviews the budget and summarizes its implications, including for gender equality.¹³ For example, a gender-aware budget analysis determines the section of public revenues intended exclusively for women, in order to rectify any earlier inequalities, such as those in education, health programmes, labour market, and so on. Furthermore, it defines the section of revenues to be used for women's issues, intended to ministries, the section for women working in the public sector, funding programmes for women's entrepreneurship, the section for women in public management, the section for each ministry intended to reduce gender inequality, and so on. Since it is used to determine gender influence of all budgeting sectors, it requires a high degree of cooperation and coordination of ministries and the public sector.

There is an array of various tools and methods for gender budgeting. Which of them will be applied depends on available resources, the scope of the gender budgeting initiative, and the stage of the implementation of gender budgeting. However, tools and methods for gender budgeting should not only refer to the distribution of expenditures and revenues, but also to employment, income distribution, the care economy, especially the distribution of paid and unpaid work, and on the use of available time. In addition, they should not neglect gender-specific needs, as well as gender-specific reactions to particular policy measures and the rating of the budget's contribution to overcoming gender stereotypes.

The main obstacles hindering the gender budgeting process may be the lack of data, appropriate tools or expertise, or merely a lack of will and/or dedication of

¹³ Guy Hewitt. *Gender Responsive Budget Initiatives: Tools and Methodology*. New York City: UNIFEM, 2002, 30-37.

the government and its administration. The main problems are if the government refuses to allocate sufficient human and financial resources to address the issue of gender budgeting, and their reluctance to consider the current means of accumulating revenues or public expenditure. These challenges can be overcome only by continual political pressure and observance of international commitments.

Checklist

1. ***Describe the stages of a Gender Impact Analysis.***
2. ***What are the factors influencing the selection of a budget analysis model in terms of gender responsiveness?***
3. ***Explain the incidence of gender analysis at different stages of the budgetary process.***
4. ***What are the techniques and tools used to implement the Gender Equality Mainstreaming Strategy?***

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Topic 10. DEVELOPMENT OF INDICATORS FOR GENDER RESPONSIVE BUDGET STATISTICS

Keywords: *direct social indicators, gender equality indicators, direct social indicators approved in the budget, social standards, financial regulations, social classification.*

10.1. Establishment of the basis of economic, social, and demographic indicators required for gender responsive budget statistics

■ The roles of men and women in various areas of society and their impact on the economy, politics, and culture has been a topic addressed in various scientific and social studies. Hereinafter we will address the establishment of the basis of economic, social, and demographic indicators required for gender statistics, through the prism of the statistical indicators available on the website of the National Bureau of Statistics of Moldova.

Quantitative data is not always objective and appearances may lead to controversial interpretations. One of the frequently faced issues, particularly in transition economies, is the reverse inclusion, when both men and women feel like being in a much worse situation than earlier, while the data show a progress in terms of gender equality, income, and social position.

In western economies, most frequently the doctrines underlying the activity of decision-makers are closer to the principle of Rawls (1972), according to which, inequalities are permitted only if the interests of the worst-off members of the society are not neglected, or if they allow growing global production and improving the situation of those who are worst-off. From this perspective, a certain disparity in the revenues in a market economy is accepted. This inequality could be measured using the index of the distribution of income or expenditure (Gini coefficient), the closer this coefficient is to 1, the more unequally the income (expense) is distributed among the nation's residents. In Moldova, the Gini coefficient (G) was 0.3436 in 2011, and in 2014 it reached 0.3225, according to the data from NBS.

Table 10.1.

**Resident population by area and sex in Moldova, during
2010-2015 (as of the beginning of year, persons)**

| Years | Total | | Urban | | Rural | |
|-------|---------|---------|--------|--------|---------|---------|
| | B | F | B | F | B | F |
| 2010 | 1713487 | 1850208 | 694469 | 782212 | 1019018 | 1067996 |
| 2011 | 1712106 | 1848324 | 696731 | 784965 | 1015375 | 1063359 |
| 2012 | 1711725 | 1847816 | 698252 | 787514 | 1013473 | 1060302 |
| 2013 | 1712346 | 1847151 | 701507 | 790658 | 1010839 | 1056493 |
| 2014 | 1711506 | 1846128 | 706524 | 796472 | 1004982 | 1049656 |
| 2015 | 1710244 | 1844915 | 708035 | 799230 | 1002209 | 1045685 |

Source: NBS of Moldova.

The data in Table 10.1 show that women are prevalent among the total number of resident population, which represented 3555.2 thousand people on January 1st, 2015, of which women accounted for 51.89%, and men – for 48.11%. This outrun persisted throughout the entire timeframe reviewed. The analysis by area of residence shows a growth of 0.43 p.p. (percentage points) in urban areas for men, and 0.53 p.p. for women, while in rural areas the number of women decreased by 0.56 p.p., and that of men – by 0.40 p.p.

The data in Annex 1 "Resident Population by Area, Age Group, and Sex in Moldova during 2010-2015" shows the prevalence of men in the age groups 0-15 in both the urban and the rural areas, with some small difference by years. Thus, in 2010, in the age group 0-15 there were 18.1% men and 16.9% women, while in 2015 there were 18.9% men and 17.5% women. In the rural area there were 33.2 % men, and 31.8% women in 2010, while in 2015 – 32.7% men, and 31.5% women.

Among the population of working age, the differences are smaller. For those over the working age, the share of women in rural areas represented 39.7% in 2015, while in the urban areas – 29.3%, compared to 2010, when the shares were 42.7% in the rural area and 26.7% in the urban area. The share of men in the rural area in 2015 was 18.2%, while in the urban area – 12.8%, compared to 2010, when the figures were 19.3% in the rural area and 11.3% in the urban area.

Table 10.2.

Correlation between men and women in Moldova during 2010-2015 (as of the beginning o year, persons)

| Years | Correlation between women and men, % |
|-------------|--------------------------------------|
| 2010 | 107,98 |
| 2011 | 107,96 |
| 2012 | 107,95 |
| 2013 | 107,87 |
| 2014 | 107,87 |
| 2015 | 107,87 |

Source: NBS of Moldova

The analysis of data in Table 10.2 shows a small reduction, by 11 women compared to year 2010, in the ratio of 10787 women to 10000 men in 2015.

In figure 10.1, one can notice that life expectancy for both sexes increased in the urban as well as the rural area. Life expectancy of women in urban area increased from 72.78 years in 1991 to 77.78 years in 2014, but decreased in the past two years compared to the maximal level of 78 years, reached in 2012, while in rural area there is a difference of almost 3 years for women.

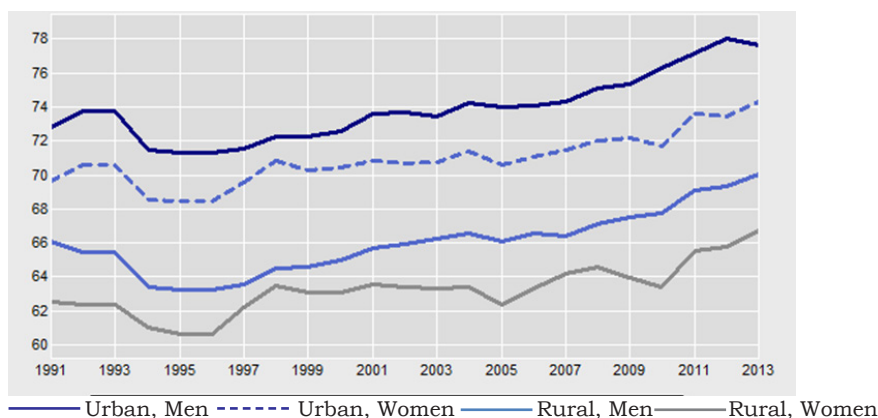


Figure 10.1. Life expectancy at birth by years, area and sex, in Moldova during 1991-2013

Source: NBS of Moldova

**Starting with 1997 – excluding the population on the left bank of the Dniester and the municipality of Tighina*

An increasing trend in life expectancy has also been noted in men, in both areas, however the difference compared to women continues, from 64.28 in 1991, to 67.52 in 2014, in total for the country. Along with the increase of the life expectancy at birth, there is also a higher aging coefficient for the population of both sexes.

Women live on average 7.9 years more than men, life expectancy at birth being 75.4 for women and 67.5 for men. This gap is due to the higher premature mortality rate among men, particularly those of working age. The mortality rate by area of residence leads also to some difference in terms of the average life length of the inhabitants of urban and rural areas. Thus, men in urban areas live on average 4.5 years longer compared to those in rural areas, while for women this gap represents 3.5 years.

Women's average age at first marriage is 24 years, while men's is 26. Most men who got married in 2014 were in the age group 25-29 (45.8%), while in case of women, marriages at the age of 20-24 years prevail (52.2%). Marriages before the age of 20 happen most frequently in rural areas: 18.9% of the marriages recorded in villages were concluded by women aged under 20, compared to 7.7% - in the urban area.

Out of the total number of marriages recorded in 2014, those concluded between unmarried persons represented 82.1% for men and 83.4% for women. At the same time, men get married after divorce more frequently than women, the share of remarried persons representing 16.7% in men and 14.8% in women. However, the share of remarried widows in the total of widows is virtually double compared to men.

The ageing rate of the population in the past three years has varied more for the rural female population (from 17.0 to 17.9 women over the age of 60 per 100 inhabitants, compared to 0.6 men over the age of 60 per 100 inhabitants, remaining at a level much lower than 11.9) (see Annex 2).

In 2014, 38.6 thousand children were born, which is 2.0% more compared to 2013. Yearly, more boys are born than girls: out of the number of live-born children, 51.6% were boys, the masculinity ratio being 107 boys to 100 girls.

The distribution of the live-born children by mother's age group shows a concentration of the latter until the age of 30. At the same time, in 2014, the decreasing trend in the share of births in women up to the age of 20 continued – 7.7% of the total number of live-born, compared to 16.9% in 2000. The average age of mothers at the first birth was 23.9 years.

Mothers in rural areas give birth at an earlier age than mothers in urban areas – 23.0 and 25.4 years respectively. Gender statistics is statistics about women and men, reflecting their situation in all areas of social life. It is one of the important instruments that allows recordkeeping of the characteristics of women and men as specific social and demographic groups, for developing optimal social-demographic policies, fulfilling the principle of equal rights and opportunities for women and men.

Table 10.3.

Distribution of population by participation in economic activity, total, 2010-2014

| Period | Active persons | | Activity rate % | Employment rate % | Unemployment rate BIM, % |
|------------------|----------------|----------------|--------------------|----------------------|-----------------------------|
| | Employed | Unemployed ILO | | | |
| Year 2010 | 1143.4 | 92.0 | 41.6 | 38.5 | 7.4 |
| Women | 570.1 | 34.7 | 38.6 | 36.4 | 5.7 |
| Men | 573.3 | 57.3 | 45.0 | 40.9 | 9.1 |
| Year 2011 | 1173.5 | 84.0 | 42.3 | 39.4 | 6.7 |
| Women | 580.9 | 34.4 | 39.3 | 37.1 | 5.6 |
| Men | 592.6 | 49.6 | 45.6 | 42.1 | 7.7 |
| Year 2012 | 1146.8 | 67.7 | 40.7 | 38.4 | 5.6 |
| Women | 570.5 | 25.6 | 38.2 | 36.5 | 4.3 |
| Men | 576.2 | 42.2 | 43.5 | 40.6 | 6.8 |
| Year 2013 | 1172.8 | 63.1 | 41.4 | 39.3 | 5.1 |
| Women | 580.7 | 25.1 | 38.6 | 37.0 | 4.1 |
| Men | 592.1 | 38.0 | 44.5 | 41.8 | 6.0 |
| Year 2014 | 1184.9 | 47.5 | 41.2 | 39.6 | 3.9 |
| Women | 588.3 | 16.6 | 38.6 | 37.4 | 3.1 |
| Men | 596.6 | 28.9 | 44.1 | 42.1 | 4.6 |

Source: NBS of Moldova.

Employment rate among women is lower than among men. The share of women in the total employed population is virtually equal to the one of men and has stayed the same during the recent years (49.6% women and 50.4% men). However, the employment rate among women was lower (37.4%), compared to that of men (42.1%), in 2014 (see Table 10.3.).

In Figure 10.2, one can notice that the activity rate for both sexes decreased from 2000 until 2012, in men – from 64.7 % to 45.16%, and in women the decrease continued until 2013, from 58.6% to 39.5%. The same drop-off trend is noticed in the employment rate for both sexes, in men from 59% in 2000 to 43.1 in 2012, and in women – from 54.6 % to 38 % in 2013.

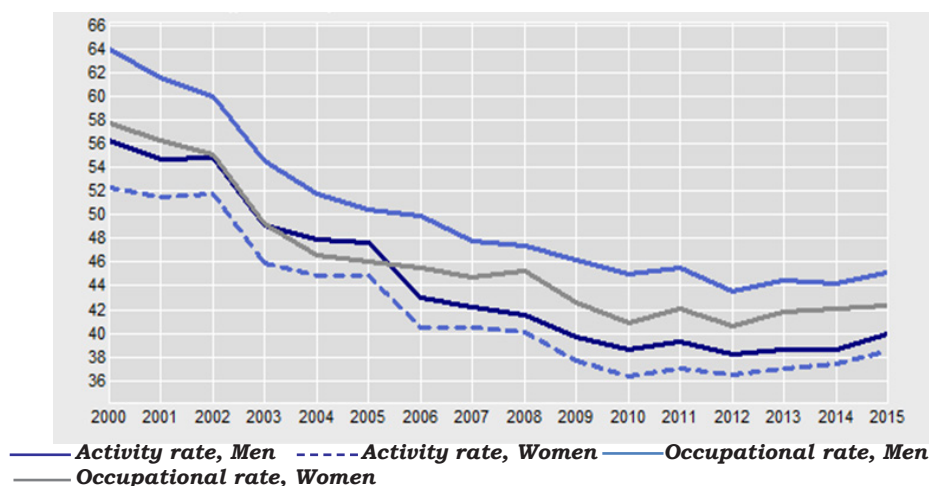


Figure 10.2. Activity and employment rates by years and sex in Moldova, during 1991-2015 (in percentage)

Source: NBS of Moldova.

In 2014-2015, there was a small increase of the employment rate for both sexes (for women – 2.6 p.p. compared to 2013). However, for men the situation is more complicated: the employment rate in 2015 decreased by 0.3 p.p compared to 2014.

For a more detailed analysis of the employment by age and economic areas, additional data are required.

The share of women's employment depends on a number of factors, including whether or not they have children under the age of 16. Therefore, for women aged between 25-49, who have at least 1 child (under 16), the employment rate is 51.4%, while for women without children, the employment rate reaches 57.8%.

On the other hand, the employment rate of women with children drops down steadily depending on the number of children: from 51.4% in case of women with 1 child, to 47.6% in case of women with 3 and more children. The employment rate is also determined by the age of child/children, most often women commit to take care of the children and therefore the employment rate in women with children under the age of 2 represents 15.3%, compared to 53% in men.

Table 10.4

**Employed population of 15 years and over by age groups,
economic sector and sex in Moldova, during 2010-2014**

(thousand people)

| | 2010 | | 2011 | | 2012 | | 2013 | | 2014 | |
|------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| | B | F | B | F | B | F | B | F | B | F |
| Age 15 and over | | | | | | | | | | |
| Total | 573.3 | 570.1 | 592.6 | 580.9 | 576.2 | 570.5 | 592.1 | 580.7 | 596.6 | 588.3 |
| Agriculture | 175.1 | 139.6 | 182.8 | 140.2 | 170.9 | 132.4 | 190.3 | 147.6 | 204.3 | 156.8 |
| Industry | 81.4 | 64.4 | 87.2 | 65.9 | 84.3 | 66.7 | 76.9 | 65.5 | 78.1 | 67.5 |
| Services | 316.8 | 366.2 | 322.6 | 374.7 | 321.1 | 371.4 | 324.8 | 367.7 | 314.2 | 364.0 |
| Age 15-24 | | | | | | | | | | |
| Total | 65.0 | 52.9 | 67.6 | 52.4 | 61.4 | 45.2 | 62.0 | 42.3 | 57.6 | 37.0 |
| Agriculture | 17.7 | 9.5 | 18.3 | 8.7 | 15.5 | 8.6 | 19.4 | 7.5 | 20.3 | 7.2 |
| Industry | 7.6 | 9.1 | 9.4 | 9.2 | 8.3 | 7.4 | 6.4 | 6.9 | 6.0 | 6.0 |
| Services | 39.6 | 34.3 | 39.9 | 34.5 | 37.6 | 29.2 | 36.2 | 27.9 | 31.2 | 23.8 |
| Age 25-49 | | | | | | | | | | |
| Total | 338.9 | 357.2 | 347.0 | 359.7 | 337.2 | 356.0 | 350.5 | 362.3 | 349.4 | 368.7 |
| Agriculture | 89.2 | 79.9 | 93.4 | 79.8 | 85.5 | 74.6 | 95.9 | 83.3 | 100.6 | 86.7 |
| Industry | 50.1 | 41.7 | 49.8 | 41.8 | 47.4 | 43.2 | 46.3 | 43.3 | 47.1 | 47.0 |
| Services | 199.7 | 235.5 | 203.9 | 238.1 | 204.3 | 238.2 | 208.4 | 235.7 | 201.7 | 235.0 |
| Age 50-64 | | | | | | | | | | |
| Total | 155.9 | 151.1 | 162.9 | 156.8 | 164.9 | 158.2 | 167.7 | 163.6 | 173.2 | 167.4 |
| Agriculture | 60.4 | 44.5 | 62.5 | 44.5 | 63.1 | 42.4 | 67.0 | 49.2 | 72.7 | 53.2 |
| Industry | 23.1 | 13.2 | 27.3 | 14.8 | 27.6 | 16.0 | 23.7 | 15.1 | 23.9 | 14.3 |
| Services | 72.4 | 93.3 | 73.1 | 97.6 | 74.2 | 99.8 | 77.0 | 99.3 | 76.6 | 99.9 |
| Age 65 and over | | | | | | | | | | |
| Total | 13.5 | 9.0 | 15.2 | 11.9 | 12.7 | 11.2 | 11.8 | 12.6 | 16.4 | 15.3 |
| Agriculture | 7.8 | 5.6 | 8.7 | 7.2 | 6.8 | 6.8 | 8.0 | 7.6 | 10.7 | 9.8 |
| Industry | 0.6 | 0.3 | 0.7 | 0.2 | 1.0 | 0.1 | 0.5 | 0.2 | 1.1 | 0.2 |
| Services | 5.1 | 3.1 | 5.8 | 4.5 | 4.9 | 4.3 | 3.3 | 4.8 | 4.6 | 5.2 |

Source: NBS of Moldova, Labor Force Survey.

At the same time, unemployment affects men more than women both in the urban and in the rural area. Thus, in 2014 there was a drop-down of the unemployment rate in the urban and the rural area, while in 2015 it increased compared to 2014 by 1.4 p.p. in the urban area and by 1.6 p.p. in the rural area.

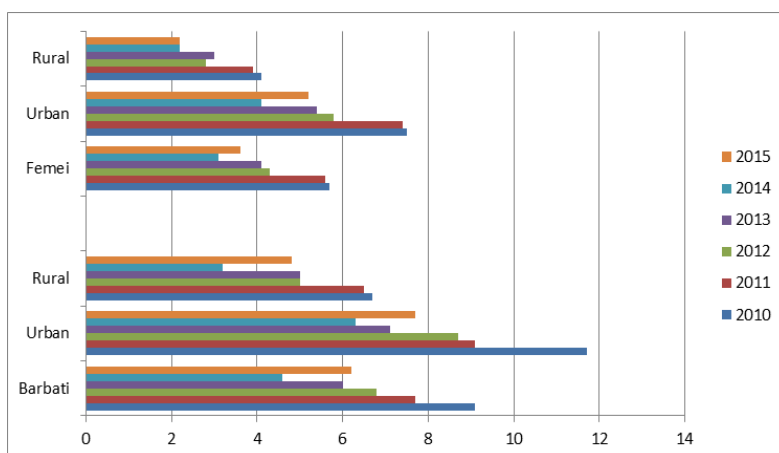


Figure 10.3. Unemployment rate by areas and sex in Moldova during 2010-2015 (in percentage)

Source: NBS of Moldova

According to the statistics, in 2010, the Millennium Development Goal indicator “Share of average salary of women in the average salary of men” represented 76.1%, while in 2013 it increased to 88.4, and in 2014 it decreased by 0.8 p.p.

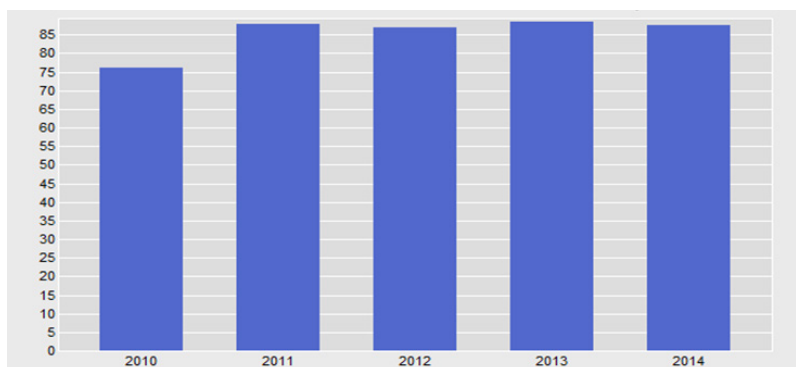


Figure 10.4. Share of average salary of women in the average salary of men in Moldova during 2010-2014

Source: NBS of Moldova

Women earn on average 12.4% less than men (87.6% of men’s average salary). In numeric value, this gap accounted on average for over 543 MDL. Thus, the average wage was: for women - 3831.7 MDL and for men - 4374.9 MDL. The level of remuneration for women is lower than for men in most economic activities, the gap ranging from 1.5% in transportation and warehousing to 27.6% in financial and insurance-related activities. Exception to this are administrative service and transportation service activities, where the average monthly salary for women exceeds that for men by 20.8%. Gender gap in terms of the salary, disfavours women, has also been identified in activities such as information and communications (-23%),

industry (-18.3%), arts, recreation and leisure activities (-15.1%), healthcare and social assistance (-10.9%), as well as in public administration and defence, and compulsory social insurance (-0,8%).

Table 10.5.

Average monthly disposable income per person in Moldova, during 2010- 2014

| Period | Year 2010 | Year 2011 | Year 2012 | Year 2013 | Year 2014 |
|--------|-----------|-----------|-----------|-----------|-----------|
| Women | 1303.5.6 | 1485.1 | 1580.0 | 1703.1 | 1757.3 |
| Men | 1259.6 | 1423.6 | 1471.7 | 1670.3 | 1772.8 |

Source: NBS of Moldova

Women hold bigger shares in the service sector as compared to the agricultural and industrial sector.

The distribution by economic sectors shows a bigger share of women employed in the service sector (59% women and 41% men). Women have a lower presence in the sectors of agriculture (43%), industry (46%), and constructions (9%), while being preponderant in such economic activities as hotels and restaurants (70.9%), education (80.0%), healthcare (85.2%), and trade (57.1%).

Women prevail in occupations requiring a higher qualification level.

Table 10.6.

Average monthly disposable wage income per person by sex of the household head in Moldova, during 2010-2014

| Period,- sexes | 2010 | | 2011 | | 2012 | | 2013 | | 2014 | |
|-------------------|-------|--------------------|-------|--------------------|-------|--------------------|-------|--------------------|-------|--------------------|
| | MDL | % from total | MDL | % from total | MDL | % from total | MDL | % from total | MDL | % from total |
| Women | 488.6 | 37.5 | 594.3 | 40.0 | 593.9 | 37.6 | 615.7 | 36.2 | 644.6 | 36.7 |
| Men | 567.9 | 45.1 | 672.5 | 47.2 | 670.3 | 45.5 | 743.2 | 44.5 | 781.7 | 44.1 |

Source: NBS of Moldova, Household budget survey.

The breakdown of the employed population by occupations (positions/professions) reveals the prevalence of women as specialists in various areas of activity (63% of women and 37% of men), as well as technicians and other specialists with medium qualification level (68% of women and 32% of men). Even higher are the shares of women among the clerks (86.8%) and the workers in the areas of services and trade (74.5%).

Table 10.7.

Average monthly disposable remittance income per person by sex of the household head in Moldova, during 2010-2014

| Period, Sex | 2010 | | 2011 | | 2012 | | 2013 | | 2014 | |
|----------------|-------|--------------|-------|--------------|-------|--------------|-------|--------------|-------|--------------|
| | MDL | % from total | MDL | % from total | MDL | % from total | MDL | % from total | MDL | % from total |
| Women | 292.1 | 22.4 | 307.0 | 20.7 | 344.7 | 1.8 | 389.8 | 22.9 | 419.3 | 23.9 |
| Men | 176.8 | 14.0 | 175.6 | 12.3 | 186.9 | 12.7 | 240.6 | 14.4 | 256.1 | 14.4 |

Source: NBS of Moldova, Household budget survey.

Women prefer employed activities and formal jobs more than men do - 72% of all occupied women are employed. For men, this indicator represents 62%. Among the non-employed, men prevail in the category of self-employed (60.3%), while women – in the category of unpaid family workers (72.3%). The share of informal occupation among women is 28%, while among men – 37%.

Table 10.8.

Average monthly disposable income per person from self-employment in non-agricultural sector by sex of the household head in Moldova, during 2010-2014

| Period, sex | 2010 | | 2011 | | 2012 | | 2013 | | 2014 | |
|----------------|-------|--------------|-------|--------------|-------|--------------|-------|--------------|-------|--------------|
| | MDL | % from total | MDL | % from total | MDL | % from total | MDL | % from total | MDL | % from total |
| Women | 55.4 | 4.8 | 71.2 | | 89.4 | 5.7 | 87.0 | 5.1 | 59.7 | 3.4 |
| Men | 100.9 | 8.0 | 111.9 | 7.9 | 117.8 | 8.0 | 130.6 | 7.8 | 145.9 | 8.2 |

Source: NBS of Moldova, Household budget survey

Table 10.9.

Average monthly disposable income per person from self-employment in agricultural sector by sex of the household head in Moldova during 2010- 2014

| Period, sex | 2010 | | 2011 | | 2012 | | 2013 | | 2014 | |
|----------------|-------|--------------|-------|--------------|-------|--------------|-------|--------------|-------|--------------|
| | MDL | % from total | MDL | % from total | MDL | % from total | MDL | % from total | MDL | % from total |
| Women | 87.9 | 6.8 | 102.3 | 6.9 | 102.3 | 6.5 | 106.5 | 6.3 | 122.1 | 7.0 |
| Men | 142.8 | 11.3 | 166.1 | 11.7 | 166.6 | 11.3 | 176.4 | 10.6 | 192.5 | 10.9 |

Source: NBS of Moldova. Household budget survey.

There are more men among the managers at all levels

Out of the total number of managers at all levels, 57% are men and the rest of 43% are women. Among the first-level managers of economic and social establishments, the gender divide is even bigger. Thus, the ration of women to men among the employers is 1 to 4 (respectively 26.9% women and 73.1% men), regardless of the ownership form of the establishment they run.

In terms of the size of establishments women most frequently run micro enterprises (31.5%) and small enterprises (24.7%), while only 18% of the enterprises with over 100 employees are run by women.

Most decision-making positions are held by men, while women continue to be underrepresented in the decision-making process.

Women's participation in decision-making at Parliament level accounts for only 18,8% (out of 101 MPs, 19 were women in 2014), while at the EU level women's share in the legislative power is 35%, and globally it is 22.6%. In 2014, out of 16 ministries, 4 were led by women.

If we take the key ministries, only one woman was a minister in them. At local level, women hold a share of 18.1% in the positions of mayor, deputy-mayor, presidents and deputy-president of raion.

Table 10.10.

**Share of women in decision-making positions (%)
by indicators in Moldova, during 2010-2014**

| | 2010 | 2011 | 2012 | 2013 | 2014 |
|--|------|------|------|------|------|
| Share of female ministers | 6.3 | 6.3 | 18.7 | 25 | 25 |
| Share of female MPs in Parliament | 25.7 | 19.8 | 19.8 | 19.8 | 18.8 |
| Share of females in police bodies | 9.2 | 9.8 | 17.9 | 18.3 | 17.1 |
| Share of female judges | 36.9 | 37.4 | 42 | 40.9 | 43.8 |

Source: NBS of Moldova

Women are underrepresented in the judicial and law-enforcement bodies.

The share of women in the total number of judges in 2014 was 43.8%. At the same time, the share of women in the total number of police staff, including in civil protection and border guard, was 17.1%.

Girls are enrolled in compulsory education at the same level as boys.

Table 10.11.

Gender parity index by education level in Moldova during 2010-2015

| | 2010/11 | 2011/12 | 2012/13 | 2013/14 | 2014/15 |
|------------------------|---------|---------|---------|---------|---------|
| Primary | 0.99 | 1 | 1 | 1 | 0.99 |
| Lower-secondary | 0.99 | 0.99 | 0.99 | 0.99 | 1 |
| Upper secondary | 1.08 | 1.08 | 1.06 | 1.06 | 1.03 |
| Tertiary | 1.37 | 1.34 | 1.33 | 1.35 | 1.39 |

Source: NBS of Moldova

Boys prevail slightly as a share of the total number of students in grades 1-9 (lower-secondary education), while in the upper-secondary education girls prevail, accounting for 57%. This is caused by the fact that after they graduate gymnasiums, more boys than girls tend to choose secondary and post-secondary vocation education.

Table 10.12.

Gross enrolment rate by education level and sex in Moldova, during 2010-2014

| | 2010/11 | | 2011/12 | | 2012/13 | | 2013/14 | | 2014/15 | |
|--|---------|------|---------|------|---------|------|---------|------|---------|------|
| | B | F | B | F | B | F | B | F | B | F |
| Gross enrolment rate in tertiary education | 31.6 | 43.2 | 32.2 | 43.2 | 33.3 | 44.2 | 32.8 | 44.3 | 32 | 44.4 |
| Gross enrolment rate in upper-secondary education | 54.5 | 58.9 | 55.7 | 59.9 | 57.3 | 60.6 | 55.2 | 58.3 | 53.5 | 55.3 |
| Gross enrolment rate in lower-secondary education | 88.4 | 87.8 | 88 | 87 | 87.1 | 86.2 | 87.4 | 86.7 | 86.9 | 86.7 |
| Gross enrolment rate in primary education | 94 | 93.2 | 93.9 | 93.7 | 93.7 | 93.8 | 93.3 | 92.9 | 92.9 | 91.9 |
| Net adjusted enrolment rate in primary education | 90.9 | 90.2 | 90.6 | 90.5 | 90.5 | 90.6 | 90.1 | 89.9 | 90.2 | 89.7 |

Source: NBS of Moldova

Girls choose mostly postsecondary vocation education, while boys choose secondary vocational education.

Over two thirds of the total number of students in the secondary vocational edu-

cation are boys, while in the postsecondary vocation education over 50% are girls. The existing gap is mainly due to the professional options students are choosing.

Given the fact that secondary vocational education is mostly focused on technical specialisations, this level of education is preferred particularly by boys. The most popular professions/trades, such as car mechanic, electric-gas-plumber-fitter, electrical fitter for repair and maintenance of electric equipment, carpenter, tractor/machine operator are dominating among boys (about 100%), while trades such as seamstress and pattern-maker are chosen primarily by girls.

In the post-secondary vocational education there is also a certain gender polarisation in terms of the specialisations. Particularly, there are more girls in pedagogy (96%), services (87%), medicine (81%) and economy (72%), while men choose mostly specialisations like electro-technics and energetics (98%), mechanics (96%), transport (89%), and constructions (82%).

Table 10.13.

Share of women in the number of teaching staff by education level in Moldova, during the academic years 2010/11-2014/15

(in percentage)

| | 2008/09 | 2009/10 | 2010/11 | 2011/12 | 2012/13 | 2013/14 | 2014/15 |
|--------------------------------------|---------|---------|---------|---------|---------|---------|---------|
| Primary and secondary general | 82 | 81.5 | 84.2 | 84.3 | 84.7 | 84.8 | 85.3 |
| Secondary vocational | 53.7 | 53.4 | 52.7 | 53.8 | 54.7 | 55.4 | 55.2 |
| Upper-secondary special | 67.6 | 71.1 | 69.8 | 69.2 | 69.6 | 69.8 | 70 |
| Higher | 54 | 54.1 | 53.1 | 53 | 53.3 | 54.4 | 54.2 |

This information does not include the data for the raions on the left bank of Dniester and in the municipality of Tighina.

Source: NBS of Moldova, Statistical reports No. 1-SGL, no. 2-prof, no. 3-colegiu, no. 4-IS.

More women than men attend higher education institutions.

Women represent 58% of the total number of students in higher education institutions. At this level of education, specialisations are also chosen based on the existing stereotypes about professions that “suit better” women or men. Thus, the areas of education where women have an overwhelming majority are chemical technology and biotechnologies (89%), social assistance (86%), education (85%), social sciences (83%), pharmacy (82%), communication science (80%), humanitarian sciences (79%), public services (75%) and medicine (73%).

At the same time, the transportation services and the military areas are dominated

by men (96% and 89% respectively). Men also prevail in such general education fields as security services (84.0%), engineering and engineering activities (86%), agricultural sciences (81%), environmental protection (73%).

Men prevail in research and development activities.

Women are under-represented in research and development activities, accounting for 48% compared to 52% of men. 47% out of the total number of PhD researchers, and 19% out of the Doctor habilitat researchers are women. Women are involved primarily in social sciences, particularly in psychology and economics, while engineering and technologic sciences are dominated by men.

Table 10.14.

**PhD graduates by forms of education and sex in Moldova,
during 2010-2014**

| | 2010 | 2011 | 2012 | 2013 | 2014 |
|--|------|------|------|------|------|
| Day courses | | | | | |
| Men | 72 | 67 | 60 | 68 | 75 |
| Women | 100 | 85 | 82 | 99 | 93 |
| Extramural courses | | | | | |
| Men | 119 | 129 | 126 | 151 | 161 |
| Women | 170 | 156 | 173 | 154 | 188 |
| Number of PhD students in day courses | | | | | |
| Men | 251 | 193 | 162 | 175 | 170 |
| Women | 309 | 295 | 232 | 231 | 262 |
| Extramural courses | | | | | |
| Men | 367 | 447 | 462 | 495 | 544 |
| Women | 623 | 621 | 629 | 621 | 652 |
| Graduates of day courses | | | | | |
| Men | 46 | 69 | 47 | 52 | 47 |
| Women | 67 | 88 | 113 | 65 | 62 |
| Extramural courses | | | | | |
| Men | 138 | 47 | 97 | 90 | 108 |
| Women | 171 | 114 | 123 | 142 | 151 |

Source: NBS of Moldova, Statistical report nr.1-cs.

Employed women have higher qualifications than men.

Employed women have higher qualifications than men: 27% of them have higher education and 17% - upper secondary special education, while among men these indicators are 22% and 11% respectively. In addition, women have a higher share

in the total number of employed people with higher education (55% women compared to 45% men) and those with upper-secondary special education (61% women and 39% men).

Women have a higher level of education than men

Women aged 25-64 have a higher level of education compared to the same age category of men. The biggest gap exists in terms of the higher education, with 22,3% of women holding this level as compared to only 17.1% of men. The upper-secondary education level has the biggest share among the total number of population, with 61.4% of men and 56.7% of women holding an upper-secondary education degree. 21.5% of men and 21.0% of women have a low level of education.

Men leave the education system earlier as compared to women, in order to enter the labour market. The share of those leaving early the educational system in the age group 18-24 represents 25.2% for men and 16.3% for women. At the same time, the level of engagement in permanent education programs is very low for both men and women (about 1%).

Women commit much fewer crimes than men do.

The share of women who committed crimes is 78 in 100 thousand women, while in the case of men it is 948 in 100. At the same time, women are involved in committing of serious crimes: 21.3% of all women criminals committed exceptionally serious, particularly serious, and serious crimes as compared to 15.4% in the case of men. However, men criminals more frequently have repeated criminal convictions and more frequently commit crimes while being drunk (17.9% compared to 3.3% in case of women).

Women commit more frequently crimes against property, freedom, public health, but also economic and drug-related crimes. Men mostly commit actions against life and health of individuals, sexual life, against family and minors, but also crimes in the area of transportation and public security.

Less women perceive their health condition as being good.

More women than men perceive their health condition as being poorer. Thus, 38.7% of men as compared to 31.5% of women state that they have a very good/good health condition. One of the factors influencing the perception of the health condition is the age. The biggest difference (about 7 percentage points) in terms of the health condition being perceived as very good/good exists in the age group 35-54.

Pensioner women exceed the share of pensioner men

Out of the total number of pensioner people registered with the social insurance bodies, about two thirds are women. Depending on the category of pensioners, the share of women varies from 83% in case of the women who benefit from survivor's pension, 71% – in case of women who benefit from retirement pension, up to 50% for the beneficiaries of pensions for disability.

About 88 thousand women and 96 thousand men benefit from either a pension or a social allowance for disability from the social insurance body. Every second disability pensioner is a woman. Men benefit primarily from pensions for severe

and medium disability, while women – from pensions for severe disability. Men beneficiaries of pensions for severe disability most frequently are aged 55-64, while women are aged 65 years and over.

Women benefit from lower retirement pensions than men.

The average size of retirement pensions for men in the non-agricultural sector is 1479.8 MDL compared 1122.3 MDL in case of women. At the same time, the average size of pension for agricultural workers is 986.5 MDL for men as compared to 931.5 MDL for women. The gap between the agricultural and non-agricultural area in the average size of pensions for women is also smaller as compared to the gap for men.

The average size of the retirement pension for women in the agricultural sector covers only 69% of the minimal subsistence level for pensioners, compared to 73% in case of men. In the non-agricultural sector, the average size of the pension for men exceeds the minimal subsistence level by 10%, while the pension for women only covers 84% of the subsistence level.

Women are involved in income-earning activities to a smaller extent than men.

The social-economic status of people is determined directly by their income sources. Women aged 18+ are more dependent on social benefits than men: virtually every third woman receives a pension as an income source, compared to every fourth man. At the same time, for 57% of the men in this age category, the main income source is the agricultural and the employee activity, compared to 42% of the women.

Men are more optimistic when appreciating the household's living standard as compared to women

Although almost one third of the total number of households appreciated the household's living standard as being satisfactory, households led by men appear more optimistic. The share of households led by men, which gave a positive appreciation to the household's living standard is about 9 percentage points higher than that of the households led by women. One of the factors influencing the perception about the living standard is the financial capacity of the household. It should be noted that a bigger proportion of the households led by men as compared to those led by women can afford incidental expenditures of 5000 MDL (14.0% compared to 9.8%).

Men are more frequently considered heads of households than women are. Out of the total number of households, 41.3% are led by women and 58.7% - by men. Virtually every fourth household led by a man is composed of minimum 4 persons (26.3%). In case of women, this category of households represents only 12.8%. Households composed of a single member are mostly characteristic for women, accounting for 47.6% of the total number of households led by women. Men are more frequently considered head of household in family couples with or without children (55.8%, as compared to 15.3% of those led by women).

Women are more frequently mentioned as heads of households composed of several family nuclei and those composed of a single parent with children. Thus, out of the total number of households led by women, 4.6% are women single carers of

children, as compared to 0.2% of the households led by men. Gender differences are also obvious in terms of the number of children in the household. Households with at least one child aged up to 18 are led mostly by men, with a difference of 6.5 percentage points as compared to households led by women.

The problems of social and economic equity have always been a focus of the researchers, the politicians, and the community as a whole. However, social and economic equity may not be achieved unless equal chances are provided to both men and women in terms of education and access to various types of economic activities. The principle of gender equality in Moldova is promoted by securing equal opportunities for women and men.

10.2. Systematization of gender responsive budget statistics indicators

The distinction between indicators and estimates is crucial for budget monitoring since budget is usually based on quantitative indicators. The provisions of the Law on Budget, on analysis and justification, are based on quantitative indicators. Any budget monitoring, including in terms of gender, is pointless unless accompanied by quantitative measurements.

Gender-based budget review is, at the core, an estimation of the gender policy in financial terms. Gender-based budget review is a tool that brings gender issues at the forefront in the financial decision-making process.

Gender-based budget review implies budget disaggregation by sex, to enable the identification of gaps in terms of financial actions within policies on different categories of people, rather than having a separate budgeting for women. The goal is to increase the transparency of the decision-making process at government level from the gender equality perspective.

Gender-responsive indicators are designed to provide quantitative budget measurement in line with the policy on equal rights and opportunities for women and men. The system of gender-responsive indicators includes several groups, being divided into direct and indirect indicators.

Along with the current sectoral and departmental classification of expenditures, a social classification should also be introduced, which would increase the level budget transparency to enable monitoring directly the gender processes reflected in budget policies.

There is a classification scheme proposed by the tenured professor, dr. L. RjaniTi-na, which breaks down the gender-responsive budget statistics indicators into 7 groups:

- Direct social indicators approved in the budget.
- Direct social indicators used for socio-economic forecast for the financial year.

- Gender-responsive budget expense indicators for measurement of population's income.
- Social indicators for protection of the population, women, and children within the complex items of the expense budget.
- Gender-equality indicators (from all information sources).
- Regional and district-level projects aimed at women and children.
- Social and normative financial standards disaggregated by sex and age.

I. According to this scheme, to calculate the **direct social indicators approved in the budget**, the item Expenses for services should be used, which represents the basis for gender-based analysis and monitoring. According to the sectoral classification, there are the following categories:

1. Expenses for social sectoral expenses (education, healthcare, social policies, dwellings, and utilities), used most frequently for women and children.
2. Increase of consumption price - %.
3. Increase of tariffs for energy, utilities, and transportation.
4. Increase rates for education, healthcare, and culture - %.

II. For **direct social indicators used for socio-economic development for the fiscal year**, we should calculate:

1. The average wage per economy (MDL per month).
2. The average pension (MDL per month).
3. Number of employees (number of people).
4. Number of jobless people registered, including women (%).
5. Minimal living wage (per month) desegregated by:
 - Person;
 - Active population;
 - Pensioners.
6. Share of population under the poverty threshold -%.
7. Life expectancy by sex (in years).

III. For **gender-responsive expense budget indicators for measurement of population's income**, we should calculate the feedback and argumentation indicators based on the budget data, the forecasts and the statistics:

1. The ratio of the minimal wage to the minimal subsistence level.
2. The ratio of the wage in the budget-funded institutions to the average national wage.

-
3. Increase of pensions in general (total, MDL per month in %).
 - including the basic pension as compared to the minimal subsistence level.
 4. Increase of the benefits for women (amount, MDL)
 - from the budget,
 - from the social insurance fund.
 5. Increase of allowances for children (MDL per month, number of beneficiaries).

IV. In order to determine the following set of **social assistance indicators for the population, women, and children in the expense budget**, we should collect the following data about the:

1. Compensatory payments to pensioners and children, rather than in-kind benefits.
2. Amenities for mother and child protection:
 - food for children, lunch at school, support for pregnant women;
 - protection of women's and children's health (types, regulations, compensation network).
3. Other expenses for children from the budget (recreation, leisure, sport, etc.) and insurance funds (types, regulations, compensation network).
4. Subsidies for dwelling.
5. Aid for the people in need (the poor).
6. Development of social institutions:
 - for children (kindergartens, extra-curricular activities),
 - for women (family/social services centres, etc.)
7. The budget for social services for the aged people and people with disabilities, including children with disabilities.
8. Social measures for the rural population:
 - funding for water/gas pipe installation,
 - providing rayon-level coefficients
 - other actions, taking into account the specifics of the rayon or the region.

V. The gender dimension is determined based on the set of **gender equality indicators**:

1. Ratio of men's wage to women's wage.
2. Budget allowances to prevent unemployment (allowances for vocational

education, public works for women).

3. Supporting program for small enterprises – total amount.
4. Share of women entrepreneurs - %.
5. Expenses for the education budget (primary, secondary, higher education, with allocation of a percentage for women in education institutions, amount).
6. Share of women with secondary, special, and higher education - total and by sex – number, %.
7. Ratio by occupations.
8. Share of women at all government levels – number, %.
9. Number of women organisations and number of their members.
10. 10. Budget allocations to support women with social initiatives – total, % of the expense budget.

VI. National and regional programs for women and children

- on actions dedicated to orphans, children with disabilities and without a home,
- to reduce infant mortality,
- to fight drug use, promote school digitization, and provide dwellings for young people.

VII. Social standards and financial regulations, disaggregated by sex and age.

Activities with the public services (education, healthcare, culture).

The target of the UN Millennium Development Goal 3 “Promote Gender Equality and Empower Women” is to “Eliminate gender disparity in primary and secondary education, preferably by 2005, and in all levels of education by no later than 2015”:

- Ratio of girls to boys in primary, secondary and tertiary education;
- Ratio of illiterate women to men, 15-24 years old;
- Share of women in wage employment in the non-agricultural sector;
- Proportion of seats held by women in national parliament.
- Share of graduation by girls/boys of all levels of education;
- Regional specific indicators – gap between the income of employed women and that of women working in the informal sector; unemployment rate by gender, by profession, etc.
- Number of women subject to domestic violence, etc.

10.3. Using statistics within gender responsive budgets

A frequent problem in GRB is the lack of gender statistics. Gender statistics includes data desegregated by sex, as well as data that are important from gender perspective (such as gender-based violence or maternal mortality). Most often there is no data about the time use or if it exists, it is outdated. This hinders the quantitative measurement of the impact of government policies and the related budgets on the unpaid care work performed by women and men.

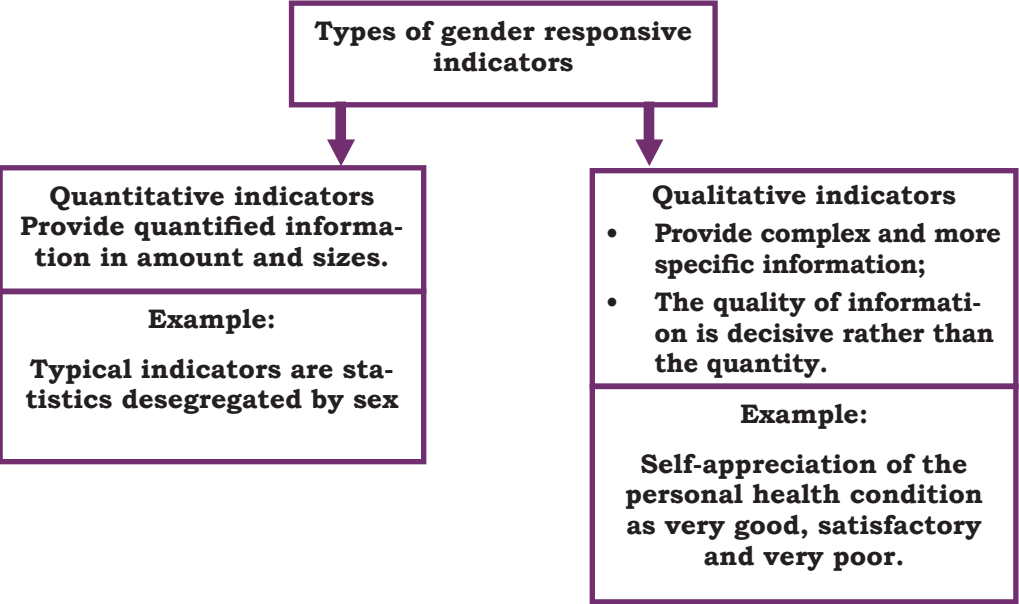


Figure 10.6. Types of gender responsive indicators

Source: *Developed by the author*

Though quantitative indicators are easier to produce and are the most common, they have some limitations. The most important is that they do not provide broader social models; they tend to show the effects rather than the reasons why gender relationships have developed in a certain way, or how these could be changed. Therefore, the system of quantitative indicators should be complemented by a gender analysis, which implies the examination (sometimes at micro level) of the social relations between women and men, as well as the structural features of the society, which increase and perpetual gender inequalities.¹

Gender analysis shows what are the qualitative indicators required in order to identify the quality of changes, the way they are perceived by women and men themselves. Due to the fact that qualitative indicators are usually obtained through participative methods of information and data collection, they can bet-

¹ Mainly due to the Beijing Declaration and Platform for Action (1995).

ter reflect the situation of women and men to the changes than the quantitative studies, where women's opinions may often be invisible.

Table 10.15.

**Share of expenses for leadership/law enforcement sectors
(for leaders of CPA/LPAs, defence, public order, security areas) in Moldova during 2010-2014**

| Desegregation | Measurement unit | 2010 | 2011 | 2012 | 2013 | 2014 |
|---|------------------|------------|------------|------------|------------|--------|
| State services with general destination | % of NPB | 4.6 | 4.5 | 4.9 | 5.4 | 4.9 |
| Total | mil. Lei | 1361.6 | 1456.6 | 1750.6 | 2084.0 | 2155.0 |
| a) state budget | mil. Lei | 908.4 | 945.7 | 1171.5 | 1382.6 | 1418.2 |
| b) budget of administrative-territorial units | mil. Lei | 453.3 | 510.8 | 579.1 | 701.4 | 736.8 |
| Maintenance of public order, defence, and state security | % of NPB | 5.3 | 5.6 | 5.5 | 5.7 | 5.8 |
| Total | mil. Lei | 1540.8 | 1804.8 | 1948.2 | 2190.0 | 2580.9 |
| a) state budget | mil. Lei | 1274.3 | 1526.2 | 1625.0 | 2177.7 | 2566.7 |
| b) budget of administrative-territorial units | mil. Lei | 259.9 | 271.0 | 314.9 | 4.7 | 8.1 |

Source: Ministry of Finance of Moldova

In these sectors, the share of men is usually bigger than in the social sectors

Table 10.16.

Share of expenses for social sectors (education, healthcare, social protection, utilities management), in Moldova during 2010-2014

| | | 2010 | 2011 | 2012 | 2013 | 2014 |
|--|-------------------|-------------|-------------|-------------|-------------|-------------|
| Education | % from NPB | 22.4 | 21.4 | 20.9 | 18.3 | 17.6 |
| Total | mil. Lei | 6574.5 | 6869.0 | 7397.0 | 7064.1 | 7823.6 |
| a) SB; | mil. Lei | 1992.1 | 2071.8 | 2209.3 | 1815.5 | 3427.4 |
| including transfers to the Budget of Administrative-Territorial Units (BUAT) | mil. Lei | | | | | 1502.9 |
| b) BUAT | mil. Lei | 4619.7 | 4813.8 | 5203.9 | 5257.8 | 5906.8 |

| | | 2010 | 2011 | 2012 | 2013 | 2014 |
|---|-------------------|-------------|-------------|-------------|-------------|-------------|
| Health protection | % from NPB | 13.6 | 13.3 | 13.4 | 13.5 | 13.3 |
| Total | mil. Lei | 3996.4 | 4259.6 | 4749.8 | 5226.9 | 3302.0 |
| a) state budget | mil. Lei | 2440.6 | 2552.5 | 2775.4 | 3066.6 | 3302.0 |
| including transfers from the state budget to the Compulsory Health Insurance Fund (FAOAM) | mil. Lei | 1926.4 | 1984.4 | 2043.2 | 2161.2 | 2200.4 |
| b) BUAT | mil. Lei | 114.7 | 77.3 | 79.3 | 98.0 | 138.0 |
| c) FAOAM | mil. Lei | 3367.8 | 3615.7 | 3951.2 | 4226.1 | 4679.5 |
| Social insurance and social assistance | % from NPB | 34.9 | 34.5 | 32.9 | 32.8 | 31.9 |
| Total | mil. Lei | 10246.0 | 11066.0 | 11626.1 | 12692.2 | 14145.9 |
| a) SB, total, | mil. Lei | 3628.1 | 3841.7 | 3901.2 | 4243.1 | 5190.3 |
| including: | mil. Lei | | | | 30.4 | 83.1 |
| transfers to BUAT | mil. Lei | 2425.8 | 2522.8 | 2567.3 | 2828.1 | 3660.2 |
| transfers to State Social Insurance Budget (BASS) | mil. Lei | 8602.6 | 9213.8 | 9747.2 | 10712.1 | 12020.4 |
| b) BASS | mil. Lei | 627.9 | 731.5 | 679.7 | 680.5 | 765.2 |
| Public utilities and housing management | % from NPB | 2.8 | 2.4 | 2.3 | 3.0 | 3.4 |
| Total | mil. Lei | 829.0 | 778.4 | 810.6 | 1172.5 | 1497.3 |
| a) SB; | mil. Lei | 193.3 | 246.4 | 152.5 | 350.9 | 427.4 |
| b) BUAT | mil. Lei | 654.0 | 539.6 | 664.3 | 828.5 | 1072.9 |

Source: Ministry of Finance of Moldova.

These areas are connected primarily to the interests of women and children both in terms of employment and in terms of the size of social benefits broken down by groups of expenses.

The lack of statistics disaggregated by gender should not represent a hindrance for the activity of GRB. However, the availability of accurate statistics is very useful for the GRB at different stages of the process, from the initial description of the situation to be addressed up to the monitoring and final evaluation.

Therefore, one aspect of GRB could focus on the existing data, thus contributing to the generation of new data. Speaking about the generation of new data, this could imply conducting such activities as one-time surveys. Moreover, such activity could also include the creation of some systems that would generate data on gender permanently, particularly output indicators which ideally should be generated by an administrative system, because these indicators should be available more rapidly than the data of a survey. This is very important, since output indicators should refer to the year in which the money was spent, that means the budgetary year that

has just ended. In case of outcome indicators, the rapidness is not so important since the outcomes usually do not appear instantly and do not relate to a specific activity or program.

In general, it is easier to use standard indicators since the data for these indicators are often available and the public will understand the arguments if well-known concepts are used. However, standard indicators should not be accepted without prior examination.

At the promotion stage, GRB should be particularly careful about the way statistics are used. Sometimes the promoters of the GRB idea look for the biggest and most shocking figures to convince people about the need to spend more money. This tactic could be dangerous - if the opponents can prove that some of the figures are inaccurate, all arguments provided could be questioned.

Last but not least, the disaggregation of data for the main budget items should also be considered. GRB analysts are often frustrated by the way the information is presented in the budget, which makes it difficult if not impossible to separate the allocations they are interested in. For instance, it is unlikely to find a separate budget line in the police budget dedicated to fighting domestic violence, because the police staff who manage domestic violence cases manage also many other cases and issues and, in most cases they use the same offices. Similarly, if someone is interested in finding out how much has been allotted for healthcare of people suffering from HIV/AIDS, they could perhaps find some separate allocations on certain items, such as antiretroviral drugs, tests or information campaigns, however, the expenses designed for the staff, materials, and other things required in order to treat people who suffer from this disease, are not separate from the expenses used to treat other diseases.

The fact that there is no separate budget line does not mean we are not able to monitor whether the government uses the budget in order to address our priority issues. In order to assess the use of resources, it is sufficient to ask for the output and the outcome indicators relating to the priority issue under review.

Sometimes policy-makers justify the lack of policies or budgets for specific issues by the fact that such policies or budgets impact a small number of people and therefore are not a priority. Similar arguments may be brought in case of issues such as the gender-based violence, since this is a “hidden” issue and it is difficult to assess this kind of problems. The justification used by GRB for such problems may be consolidated if creative methods are found to generate indisputable data.

Demographic and population statistics is a key issue for UNFPA. In most countries, population census represents the most important source of data to estimate long-term trends among the population. Census analysts could present a series of findings and models that have implications on the budget. The problem of gender correlations is further analysed in some developing countries, where there is also a continuous process called “population ageing”. Many people define this term as a bigger proportion of aged people among the population. This has the following gender implications: (a) most aged people are women and (b) particularly women (young and medium age) are those who take care of the elderly. However, the concept of population ageing has a broader meaning, it also implies that the share of children in the total population is smaller, and the share of younger and medi-

um-age adults is bigger. This also implies the reduction of budget allocations for education and the increase of allocations for healthcare and other areas.

Population census is usually conducted every ten years or every five years at best. Additionally, census tends to include as few questions as possible in order to reduce the time for interviews with each household in the country. Many countries conduct periodic demographic and health surveys in order to present as much information as possible in between the censuses.

As mentioned at the beginning, there is no single GRB model. On the contrary, GRB represents a perspective and a method used in the gender equality integration approach, which answers the following question: “What is the impact of public budgets on women and men, girls and boys”?

Currently, the National Registry as well as the links it provides to other administrative registries, through the methods of assigning numbers to personal identities, represents an example of an important source of statistical analysis of the differences between men and women. Simple studies, such as the study on the use of time, on labour force, etc., are examples of other data sources that contribute to our understanding of the distribution of funds among men and women. Many public authorities produce official statistics, but NBS is the main body responsible for the collection, processing and publicizing of these statistics. The National Bureau of Statistics should have a special coordinator for gender equality, whose function should be to help focalising on the gender dimension and keep in touch with the statistics producers, as well as with the research entities within different specialised authorities.

The goal is to have all population statistics disaggregated by gender. Examples of areas reflected in gender responsive statistics within NBS are education, labour market, representation in leading positions, wages, etc. Gender statistics are available online on <http://www.statistica.md>. NBS publicises on yearly collections of data and reports synthesizing various direct or indirect indicators of gender equality, which show the extent to which women and men participate in politics, education and labour market.

Overall, there are statistics desegregated by gender and gender responsive indicators. However, there are still some issues related to the visibility thereof, the level of detail, the selection of areas for data collection, and the inadequate budgeting for the development of gender statistics. For non-statistician data users it is difficult to get an picture from isolated tables available in various statistical areas. The fact that gender aspects are relevant in almost all statistical areas makes them invisible to a certain extent. Therefore, there is a need to develop some special materials or publications to provide a very clear gender picture or the data analysis should include an explicit review of the gender aspects.

Checklist

1. *Describe the developments in terms of the resident population by area and sex in Moldova, in the past five years.*
2. *How has the correlation between women and men evolved in Moldova in the past five years?*
3. *Describe the life expectancy increase trend by area and sex in Moldova, in the past five years and its impact on the national economy.*
4. *How has the distribution of population evolved in terms of the participation in the economic activity in Moldova in the past five years?*
5. *What has been the share of women's average wage in the men's average wage in Moldova in the past five years? Draw the conclusions.*
6. *Why do average monthly disposable incomes from remittances per person differ depending on the head of the household? Draw the conclusions.*
7. *Describe the gender parity index by education levels in Moldova, during 2010-2015.*
8. *What share of household expenses are used to buy food, education, and healthcare services? Who controls the household budget and what is the say of women in terms of the way expenses are made?*
9. *How much of the public budget expenses are directed towards areas that are a priority for women, such as education and healthcare? What is the role of women in planning the public budget at national level?*
10. *Are the education and healthcare systems privatized? If yes, what are the gender implications?*

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Topic 11. GENDER-RESPONSIVE BUDGETARY PROCESS

Keywords: *Budget, Gender-responsive budget, Budgetary-fiscal policy, Budgetary process, Budget cycle, Budget planning, Gender-sensitive budget planning.*

11.1. Peculiarities of gender-responsive budget

Being an instrument for implementing state policies by raising and distributing resources, the budget is an indispensable means of achieving gender mainstreaming approach. Thus, a **gender-responsive budget** is a financial plan developed for the purpose of improving the governance and rationally using the public finance with a view to achieving economic, social and gender equity.

The Council of Europe addresses **Gender-sensitive budget** as mainstreaming gender into the budget process. It entails the assessment of the budget process from gender perspective, incorporating the gender dimension at all budgetary process levels, and restructuring the revenues and expenditure to promote gender equality. In the World Bank's meaning, the *Gender-sensitive budget* should highlight the economic empowerment of women by emphasising their opportunities to participate in land, labour, financial and product markets, by promoting the joint contribution to economic growth, and speeding up implementation of the Millennium Development Goals.

Up till now the GRB concept has been perceived in different ways, and the notions such as “gender budgets”, “women’s budgets”, “gender-responsive budgets”, “gender-sensitive budgets” were used. Most of the time, all these terms referred to the effort of promoting gender equality and gender equity with the help of governmental budgets.

The notion of “women’s budget”, for example, often creates the illusion that the GRB means separate budgets for women or men. This confusion can occur even when these terms also incorporate the “gender” definition. GRB does not entail separate budgets for women or men, girls or boys. The **“gender-responsive gender”** is generally used to describe different means of presenting how policies are promoted in a country, a region or a municipality (city hall), and affects the distribution of resources between men and women, boys and girls. Gender-responsive budget also includes the processes launched at the public administration level, to highlight the gender equality dimension in the budget process and policy development process.

GRB is an effective tool for fulfilling the responsibilities under the international conventions on human rights.

In 2001, OECD countries adopted the general objective according to which all countries have committed to start developing gender-responsive budgets by 2015.¹

Box 11.1.

Other international forums which expressed their support for gender mainstreaming into budget processes include:

- High-Level International Conference “Strengthening Economic and Financial Governance through Gender-Responsive Budgeting” held in Brussels in 2001, and organised by the Nordic Council of Ministers, the OECD, the Commonwealth Secretariat, the Government of Italy, FNUF and IDRC.
- The 6th European Ministerial Conference on Equality between Women and Men, organised by the Council of Europe in 2006. The Conference adopted the resolution “Human rights and economic challenges in Europe - gender equality. Achieving gender equality: a challenge for human rights and a pre-requisite for economic growth”.

Gender-responsive budget helps with the development of methods for successful governance. The OECD Best Practices for Budget Transparency² states that the link between good governance and good economic and social development is now widely recognised. This guideline indicates: “*The budget is the most important policy regulation document in which policy objectives are coordinated and implemented in fair terms. Budget transparency is defined as full, systematic and regular disclosure of relevant fiscal information.*”

Thus, gender-responsive budget improves budgetary governance and transparency by³:

- highlighting and documenting the unwanted differences between sexes;
- focusing the efforts on opportunities for women and men, for better understanding and elevated ability to generate new solutions for the population;
- performing the gender analysis which brings greater precision in the formulation of activities, which, in turn, generates increased efficiency in the use of economic resources, and a better quality of the activities undertaken;
- deeper analysis and knowledge accumulation, which leads to increased awareness, and can help reduce the unintended consequences of policies implemented;
- providing an opportunity to politicians, MPs and civil society to better follow the national gender equality objectives. The aim of the gender-responsive budget is to make sure that the budget and the Government’s policies and programmes reflect the needs and interests of individuals belonging to different social groups.

¹ High Level International Conference on ‘Strengthening Economic and Financial Governance through Gender Responsive Budgeting’ Brussels, 16-18 October 2001.

² OECD, Best Practices for Budget Transparency, May 2001

³ Till Konferensen i Finland

The analysis of governmental expenditure and revenue impact on women and girls compared to men and boys is rapidly turning into a global movement for developing the accountability for the commitments of national policy taken towards women.

Through the development and implementation of various tools and techniques, gender-responsive budgets could help significantly in achieving the following *benefits for the Government*:

- increased effectiveness of public expenditure;
- providing benefits to those who need them most;
- improved monitoring of state services;
- increased transparency and accountability;
- work with civil society to boost development and democratic governance;
- reporting on progress on meeting the national and international gender commitments.

The *benefits of* developing gender-responsive budgets for *groups of women* should also be highlighted. They include:

- Improved advocacy and monitoring initiatives;
- Increased public representatives' and Government's accountability;
- Identifying the needs of the poorest and helpless.

Gender-responsive budget may entail a wide range of activities, including research, dissemination, monitoring, training, information, analysis and policy development. Thus, the Government, the Parliament, the civil society, the academia, the donor community and international financial institutions are involved in the aforementioned activities. Gender-responsive budget is actually a component part of the gender-mainstreaming effort. Being a law, the budget is subject to strict procedures related to budget development, review, approval, implementation and reporting.

11.2. Ways of mainstreaming gender into budget

The budget process is the set of measures and actions, in annual succession, undertaken by public institutions to define the financial policy, and are related to the development, approval and implementation of the annual budget law, until the closure of the budget implementation account.



Figure 11.1. Budgetary process stages

The operations the budget process consists of bear the imprint of the specific national legal and administrative frameworks within which they are carried out. As far as the implementation over time is concerned, the budget process lasts for about two and a half years, covering over three consecutive calendar years, in close connection with the powers conferred by law to central and local bodies of state power and administration in fulfilling the state functions and tasks.

The budget process is conducted in a well-defined legal framework. The following laws govern the budget system and budget process: the Law on public finances and budgetary-fiscal responsibility no. 181 of 25 July 2014, the Law on local public finances no.397-XV of 16 October 2003 and the Budget Classification approved by Ministry of Finance Order no.208 of 24 December 2015, the Customs Code and the Tax Code with all component titles currently in force. Of course, the legislative picture of the budget process is much wider, but we have highlighted the legislative framework which forms the basis for budget development and implementation.

The application of gender-responsive budgeting requires a detailed examination of the specific circumstances of each country.

Generally, **two GRB aspects exist**, which are particularly important, namely: the *ex-ante* and *ex-post* aspects.⁴

The first ***ex-ante*** aspect refers to mainstreaming gender into the economic models comprising the medium-term economic and fiscal policy framework. The *ex-ante* aspect entails budget-related objectives of programmes, and the establishment of criteria which would reflect gender equality. Programmes with gender-responsive budgetary objectives are an essential part of the budget planning and development, and are used in the formulation and quantification of general objec-

⁴. HADZIAHMETOVIC Azra, DURIC-KUZMANOVIC Tatjana, KLATZER Elizabeth M. RISTESK Marija. Gender Responsive Budgeting, Textbook for Universities. "UNIVERSITY PRESS – MAGISTRAT EDITIONS" Publishing & Booktrading Company, Sarajevo, 2013.

tives for the short, medium and long term with regard to gender equality. Thus, programmes are implemented through budgetary measures, and the budget is audited and assessed based on their implementation. Even if budgetary objectives do not always have to be measurable or expressed in monetary terms, their precise formulation and quantification is indispensable to the overall vision of their successful application. Benchmarking requires procedures for establishing benchmarks that are used to specify the effects of budgetary changes. These procedures include the development and specification of indicators, which establish the basic dimensions of gender relations and reflect the budgetary goals of the programme. In other words, the procedures are used to analyse the consequences: the results of budgetary measures implemented. The methods described include the development of a relevant Report on Gender-Responsive Budget, which is a Government report on budget overview (Explanatory Note), which includes the gender equality implications.

The second **ex-post** aspect concerns the budgetary outcomes that reflect the state of gender (in)equality. This refers to procedures for assessing gender-responsive policies. In this case, both the impact of a certain policy on gender equality and the ways in which such a policy can be redefined are explored, and the re-allocated resources will improve gender equality.

Below are described the possible activities that can be integrated at various stages of the budget process as part of gender-responsive budgeting.⁵

1. Draft budget development stage.

- Ensure that budget appropriations for the implementation of programmes, plans and activities are distributed in such a way as to ensure equal treatment of men's and women's needs.
- Assessing the potential impact of new revenue collection methods on different groups of men and women in correlation with their ability to pay.
- Comparing the budget estimates for current year with adjusted estimates and actual spending of previous year, and applying corrective measures for proper and full use of budget funds during the current year.

2. Budget adoption stage.

- The analysis of trends in a sector or ministry, and the share of appropriations and spending – as an indicator of the Government priorities.
- The analysis of the revenue side, including of sources of revenue, grants, etc., the impact on women and men.
- The analysis of trends and participation: absolute dynamic (reduction or increase) and relative growth (percentage).

⁵. HADZIAHMETOVIC Azra, DURIC-KUZMANOVIC Tatjana, KLATZER Elizabeth M., RISTESK Marija. Gender Responsive Budgeting, Textbook for Universities. "UNIVERSITY PRESS – MAGISTRAT EDITIONS" Publishing & Booktrading Company, Sarajevo, 2013.

3. Budget implementation stage.

- The analysis of how budget funds were used (whether they have been used according to the planned purpose and in full amount).
- Cost analysis of activities implementation.
- The analysis of grant recipients.
- The analysis of budget funds designation (whether they have been used to benefit those for whom they are designated).

4. Budget post-implementation stage.

- The analysis of final outcomes and impact of programmes and projects financed from budget funds.
- The analysis of expected and actual outcomes, including of unexpected ones, of the use of budget funds.
- The assessment of how budget funds were used in the light of final outcomes' effectiveness.
- The assessment of changes which took place as a result of the specific spending (impact).

11.3. Responsibilities of participants in gender-responsive budget process

Mainstreaming gender in the state budget is a long process which, firstly, requires the awareness and understanding of the contribution of gender perception, the improvement of the economic governance and performance-based management by ensuring gender equality priorities and allocation of visible resource in the budget.

Increasing the participation of different groups in each stage of the budget process is an important way of creating opportunities for introducing gender considerations.

Since 2015, the budget process in Moldova has been governed by the Law on public finances and budgetary-fiscal responsibilities no. 181 of 25 July 2014, which outlines the institutions and bodies with responsibilities specific to each stage.

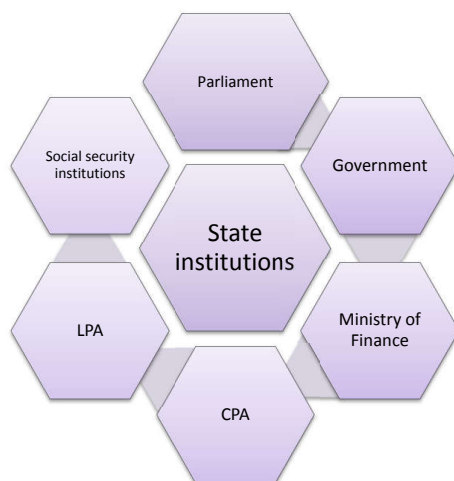


Figure 11.2. Institutions and bodies with responsibilities in the budget process

The theory and global practice suggest that because they have basic functions within the budget process, these participants can be charged with some responsibilities related to gender-responsive budgeting.

Table 11.1.

Responsibilities of the participants in gender-responsive budgeting

| RESPONSIBILITIES UNDER THE BUDGET PROCESS ¹ | GENDER-RESPONSIVE RESPONSIBILITIES |
|---|---|
| Parliament | |
| 1) examine and adopt laws on public finance, annual budget laws and laws on budget amendments; 2) examine and approve the annual reports on implementation of the state budget, state social insurance budget and compulsory health insurance funds and semi-annual report on the implementation of the national public budget and its components. | During the examination of the draft Annual Budget Law, the Parliament is entitled to request a separate chapter in the Explanatory Note dedicated to gender impact assessment of the draft Budget Law by categories of expenditure/ revenue or by sectors. In such a way, it assures the correlation between the strategic objectives, sectoral policies and their budgeting based on gender dimension. During draft budget examination stage, the Parliament discusses with representatives of civil society and academia the level of budget appropriations that would ensure gender equality. The Parliament is vested with a supervisory function over budget implementation from the point of view of gender impact. |

⁶. Legea finanțelor publice și responsabilității bugetar-fiscale, nr.181 din 25.07.2014

| RESPONSIBILITIES UNDER THE BUDGET PROCESS ¹ | GENDER-RESPONSIVE RESPONSIBILITIES |
|---|--|
| Government | |
| <p>1) fulfil the general management of executive activity in public finance management in accordance with the principles and rules established by law;</p> <p>2) ensure the sustainability of the governance programme and other policy documents from the budget-fiscal point of view;</p> <p>3) approve the Medium-Term Budgetary Framework, and submit the draft law on medium-term macro-budgetary limits to the Parliament;</p> <p>4) approve and submit the draft Annual Budget Law and draft laws on budget amendments to the Parliament;</p> <p>5) submit reports on the implementation of the National Public Budget and its components to the Parliament.</p> | <p>Coordinate and monitor the implementation of strategies, programmes and policies, including gender dimension, based on gender statistics to assess the gender impact in each national economy sectors.</p> <p>Ensure the examination and approval of bills/resolutions, including of the draft Annual Budget, only if they receive the endorsement from the gender impact point of view.</p> <p>Ensure the establishment of gender-disaggregated database for all national economy sectors, and the development of the NBS' annual report on gender statistics at national and regional level.</p> <p>Submit to the Parliament, at its request, materials that include information on ensuring gender equality by allocating financial resources from the budget.</p> <p>Monitor and perform the analysis of budget implementation from the point of view of gender impact.</p> |

| RESPONSIBILITIES UNDER THE BUDGET PROCESS ¹ | GENDER-RESPONSIVE RESPONSIBILITIES |
|---|---|
| Ministry of Finance | |
| <p>1) establish the intermediate activities of the budget calendar, and monitor its implementation and ensure overall coordination of the budget process;</p> <p>2) develop and ensure the implementation of budget-fiscal policy in accordance with the principles and rules set by the budget-fiscal law;</p> <p>3) develop and submit the Medium-Term Budgetary Framework and the draft Law on medium-term macro-budgetary limits for approval to the Government;</p> <p>4) examine budget proposals of the central public administration authorities, develop and submit to the Government the draft Law on State Budget for the year in question, and, if necessary, draft Laws on State Budget amendments;</p> <p>5) examine the draft Annual Laws of the State Social Insurance Budget, Mandatory Health Insurance Funds and consolidated summaries of the draft local budgets of level 1 and 2, and determine the inter-budgetary transfers in accordance with the law;</p> <p>6) produce and publish periodic and annual reports on state budget implementation and on National Public Budget implementation;</p> <p>7) endorse the draft regulations with financial implications for budgets, and draft agreements, memoranda, protocols and other documents of financial nature, concluded with other States or international organisations.</p> | <p>The Ministry of Finance has a key role as budgetary process coordinator. It is responsible for gender mainstreaming into documents which ensure the coherent implementation of activities within the budgetary process stages.</p> <p>Mainstreaming gender considerations into the budgetary-fiscal policy, ensuring the correlation with the NDS and the National Gender Equality Programme.</p> <p>Include gender considerations in methodological documents (medium-term macro-budgetary limits, objectives of remuneration and employment policy in the budget-funded sector, the Ministry of Finance's Circular on the development of sectoral spending strategies, Sectoral spending strategies, the Medium-Term Expenditure Framework with its relevant annexes, circulars of the Ministry of Finance on the development of draft budgets for next year and budget estimates for the next two years, the peculiarities of the development of draft budgets for next year and budget estimates for the next two years by the central and local public administration authorities).</p> <p>Include the progress on gender objectives achievement in budget implementation reports (the State Budget, the State Social Insurance Budget, and Mandatory Health Insurance Funds).</p> <p>Ensure, through budget appropriations, the implementation of programmes, plans and activities so that they meet the women's and men's needs.</p> <p>Assess the potential impact of new methods of revenue collection on women and men in connection with their ability to pay.</p> <p>Negotiate the distribution of budget appropriations with relevant ministries to ensure gender equality.</p> |

| RESPONSIBILITIES UNDER THE BUDGET PROCESS ¹ | GENDER-RESPONSIVE RESPONSIBILITIES |
|--|--|
| Central Public Administration Authorities | |
| <p>1) organise budget planning, implementation, accounting and reporting systems in a given public authority and, where appropriate, in subordinated budget-funded entities;</p> <p>2) develop, approve, and ensure the implementation and reporting of sectoral spending strategies;</p> <p>3) establish sectoral policy priorities and ensure compliance of sectoral spending strategies with strategic planning documents and with the forecasted/budgeted spending limits;</p> <p>4) ensure the distribution of sectoral spending limit by budget-components of the National Public Budget and by the central public authorities within the sector of responsibility, and determine the special purpose transfers from the State Budget to local budgets;</p> <p>5) submit to the Ministry of Finance proposals for the development of the Medium-Term Budgetary Framework and draft State Budget Law, financial reports, performance reports, other reports and information needed to draft the reports provided by this law, and are responsible for timely submission and accuracy of the submitted information;</p> <p>6) participate in the justification and promotion of the draft Medium-Term Budgetary Framework and of the Annual State Budget Law, and of State Budget implementation reports, including on programmes' performance in the areas of their competence;</p> | <p>Develop, coordinate and monitor the implementation of sectoral public strategies, programmes and policies, including in terms of gender dimension, based on gender statistics to assess the gender impact on the corresponding sectors.</p> <p>Ensure the development and examination of draft regulations/laws by specific areas of activity, including of the Annual Budget Laws by endorsing them in terms of gender impact.</p> <p>Participate in the creation of gender-disaggregated database by corresponding sectors, and include the information with gender analysis at sectoral level in the annual reports.</p> <p>Negotiate the distribution of budgetary appropriations with the Ministry of Finance to assure gender equality.</p> |

| RESPONSIBILITIES UNDER THE BUDGET PROCESS ¹ | GENDER-RESPONSIVE RESPONSIBILITIES |
|--|--|
| 7) ensure the distribution and approve the limits of annual budget appropriations and the performance indicators for the subordinated institutions, and monitor their financial and non-financial performance; | |
| Local Public Administration Authorities | |
| <p>1) develop, approve and manage local budgets in accordance with the principles and rules established by law and in accordance with the Law on local public finances;</p> <p>2) develop budget forecasts and undertake, within the limits of their competence, measures to increase the tax base and ensure the medium- and long-term sustainability of local budgets;</p> <p>3) put forward, through local government representative associations, proposals during the development of budgetary-fiscal policy and sectoral policies, and participate in consultations on inter-budget relations;</p> <p>4) cooperate with state institutions and implement local programmes and policies outlined in national strategic planning documents;</p> <p>5) publish local budgets and reports on their implementation, including on local programmes' performance;</p> | <p>Perform gender analysis in the administered territory to create a gender-disaggregated database which will base the financial decision-making in achieving gender equity.</p> <p>Develop local development strategy and submit proposals during the development of sectoral policies by mainstreaming the gender dimension.</p> <p>Cooperate with central public authorities and implement local programmes and policies outlined in national strategic planning documents while assessing their impact in terms of gender.</p> <p>Develop and approve the local budget, including a separate annex highlighting the gender impact of the BL.</p> <p>Develop program- and performance-based budgets while integrating gender consideration by formulating gender-responsive objectives and performance indicators correlated with the local development strategy.</p> <p>Include the progress of achieving gender-related objectives in the local budget implementation reports.</p> <p>Ensure, through budget appropriations, the implementation of programmes, plans and activities (approved at the local level) so that they meet the women's and men's needs.</p> <p>Negotiate the distribution of transfers and other budget appropriations with the Ministry of Finance to ensure gender equality.</p> |

| RESPONSIBILITIES UNDER THE BUDGET PROCESS ¹ | GENDER-RESPONSIVE RESPONSIBILITIES |
|---|--|
| Budget-funded Entities | |
| 1) develop and submit budget proposals; 2) distribute the limits of budget appropriations according to budget classification; 3) collect revenue under the law; 4) assume budgetary commitments and make expenditure for the purposes of and within the limits of budget appropriations; 5) implement and report programmes in accordance with the objectives and performance indicators committed; 6) publish budgets and reports on budget implementation, including on programmes' performance. | Represent the main sector that implements state policies in all fields, including the gender policy. In such a way, all types of basic information are collected, which is used for gender analysis, creating the regional gender statistics base. Quantify all performance indicators of programmes (sub-programmes) and formulate them in the light of gender dimension. Include the progress on gender-responsive indicators' implementation in the reports on institution's budget implementation. |

In addition to the aforementioned institutions, other participants and beneficiaries, including representatives of academia, civil society, citizens and, last but not least, international agencies and organisations, are engaged in gender-responsive budgeting.

Thus, the Moldovan **academia** has been the promoter of GRB implementation both by including this subject in the academic curriculum and as the main disseminator and developer of the GRB concept within CPA and LPA.

In many countries, the success of the initiative to implement gender-responsive budgeting is distorted due to the lack of involvement of **civil society** groups that provide expertise and are intended to put pressure on policymakers in view of addressing the political, economic and social issues.

Groups of NGOs which work along with the Government, as “critical friends”, interest the Government in implementing the gender equality agenda. However, some foreign economists specialising in gender issues can be sceptical about the Government's ability to address adequately the gender issues and, on the contrary, Governments could cause suspicion among NGOs. In addition, NGOs have concerns about maintaining their independent voice and critical distance.

Citizens always occupy positions that are essential to the achievement of the success of many projects. Ideally, initiatives should not rely on citizen's support, because, once these key players move to another job or are replaced, the project may suffer setbacks. Initiatives should aim at creating a foundation for institutionalising gender-responsive budget processes, while these people have the power and the climate is favourable.

International agencies play a significant role. A number of multi - and bilateral agencies have expressed their support for gender-responsive budgeting, including the Secretariat of the United Kingdom, the International Development Research Centre (IDRC); the European Union (EU), the Nordic Council (in its own budget); Organisation for Economic Cooperation and Development (OECD); the United Nations Entity for Gender Equality and the Empowerment of Women (UNWOMEN); the Swedish International Development Agency (SIDA), the Swiss Development Corporation; German Agency for Technical Cooperation (GTZ), the UK Department for International Development (DFID), the Governments of Denmark, the Netherlands and Norway, and the United Nations Development Programme.

Checklist

1. *What are the synonyms of “gender-responsive budget” definition used in theory and in global practice?*
2. *What is the proportion of funds allocated for men and women in a gender-responsive budget?*
3. *What do gender-responsive budgets aim at?*
4. *What do gender-responsive budgets help to?*
5. *How can the “budgetary process” be defined?*
6. *Specify the most important laws, under which the budget process is carried out in Moldova.*
7. *What are the budgetary process stages in Moldova?*
8. *Give a short summary of the links between the participants in all budget process stages.*
9. *What are the main participants in the budget process?*
10. *What are the functions of the legislative and executive public authorities in the budget process?*
11. *What are the main actors in gender-responsive budgeting? What is their role in mainstreaming gender into the budget process?*
12. *What is budget planning?*
13. *What does budgeting mean, and what is its purpose?*
14. *What are the differences between planning and budgeting?*
15. *What budget development method is used in the budget process practice in Moldova?*
16. *Describe the indicative schedule of the MTBF document under the current Moldovan legislation.*
17. *Whose needs and interests are addressed in gender-responsive budgets drafted during the budget process?*
18. *What are the ways of creating opportunities to introduce gender considerations in the budget planning process?*
19. *What is gender-responsive budgeting?*

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- 20. What are the ways of mainstreaming gender in the budget process?**
21. What is the gender-responsive budgeting methodology about?
22. What can be the main stages of gender mainstreaming into the state budget?

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Topic 12. INTEGRATING GENDER RESPONSIVE INDICATORS INTO PROGRAMME BUDGETING

Keywords: budget, gender responsive budget, budget and tax policy, programme, sub-programme, line-item budgeting, programme budgeting, gender responsive indicators, resource indicators, output indicators, outcome indicators, impact indicators, efficiency indicators.

12.1. Logical framework for integration of gender equality in programmes and projects

Permanent gender-based budget analysis enables an understanding of the breadth of women's paid and unpaid work in both the formal and informal sectors of the economy, as compared to men's work, as well as developing a strategy for fair and effective implementation of socio-economic programmes and projects.

The logical framework for implementation of gender equality integration in programmes and projects¹ may be represented as follows.

1. Organisational mandate, covering:

- ❖ The existence of the policy, strategy or activity in the area of gender equality;
- ❖ Integration of the gender component in the organisation's mandate / strategic plans and policy / the institution's strategy;
- ❖ The evaluation / monitoring structure and the plan to integrate gender equality therein.

2. Organisational structure / resources / gender equality potential, covering:

- ❖ The organizational structure in support of gender equality (establishment of a gender unit and working groups, etc.);
- ❖ Dedicated resources (presence of specialists in the field of gender equality, development of a gender responsive budget);
- ❖ Skills of staff members of both sexes (levels of training, abilities);
- ❖ Gender equality approaches/processes, developed tools / methodologies (collection of information disaggregated by gender, information sources, databases, etc.);

¹ Materials of the "Gender Equality" Regional Seminar for CEE countries, Moscow, Canadian Embassy, 28 Nov 2003.

- ❖ Support to gender equality by members of management, including support of experts and designated teams;
- ❖ Decision-making process / mechanisms within the organization (who is involved?, what mechanisms are used to account for gender equality issues?);
- ❖ Gender structure of employees at various levels within the institution / organisation.

3. Programme-related issues regarding:

- ❖ Analysis of external environment and of local context, e.g. the current environment for gender equality (government policies, strategies, relevant social and gender analyses carried out by the institution's / organization's own staff and by other agents);
- ❖ Local factors either hindering or supporting gender equality efforts (opportunities and constraints);
- ❖ Knowledge of policies in the field of gender equality, development of programmes according to priority areas in the field of gender equality;
- ❖ Programme / project management i.e. management of gender equality outcomes; integration of gender equality at various stages of the programme / project cycle (development, planning, implementation, monitoring and evaluation):
 - gender analysis,
 - identification of gender issues (constraints and opportunities),
 - development of strategies, expected results and indicators,
 - implementation,
 - gender equality monitoring / assessment,
 - report on advances in the field of gender equality.

4. Institutional links / partnership for gender equality, including:

- ❖ Links (relationships) in the field of gender equality – both formal and informal (partnerships, networks, communications) – with other organizations, donors, NGOs, women's groups, women community leaders;
- ❖ Partnership weaknesses / strengths & partnership opportunities;
- ❖ Other links aimed at gender equality.

5. Lessons learned should highlight:

- ❖ The problems identified in the field of gender equality;
- ❖ Best practices / experiences on integrating gender equality acquired during the implementation process, which can be shared with others;

- ❖ Identified socio-cultural barriers, mediation and problem-solving mechanisms.

The above guidelines and tools are applicable not only to organisations or institutions dealing with women's rights as part of their mandate and mission, but also to other organisations active in the fields of education, environment, health, media, protection of rights of all population categories, etc.

12.2. Gender responsive budgeting in terms of programmes and performance indicators

The budgetary resource allocation process aims to achieve the Government's social and economic objectives. At the same time, new methods of budget management will have to be applied in order to establish a link between resource allocation and policy outcomes. One of such methods is programme budgeting justification and monitoring.

Moldova currently has a Methodological Kit on "budget drafting, approval and amendment", approved by Order of the Ministry of Finance No. 209 of 24 Dec 2015, which showcases the methodologies for programme budgeting development.

In its budgeting practice, the country uses the programme budgeting method, which has replaced line-item budgeting (a method used at central level until the early 2000s²). The latter was based on the budgetary classification of income and expenditure.

The **items budget** is a financial document which keeps track of the funds planned for use by public administration for each item. This type of budget contains appropriations for certain categories of expenditure. While easy to develop, it does not provide any information on the activity or functions pertaining to any given programme or project. The line-item budgeting should comprise detailed and clear information for lawmakers (councillors) on the amount allocated, the targeted area or direction (functional group, e.g. agriculture, healthcare), but does not make it possible to observe how much money will be used and for what purpose or specific action; it merely provides an overview.

The *line-item budgeting* emphasizes on the means planned for deployment during the budget year – that is, whatever needs to be procured. On the expenditure side, the budget focuses on procurement of goods and services. It is important to note that the planning of State-guaranteed budget expenditures for budgets of administrative-territorial units must take into account the unique norms of per capita or population group expenditure in the considered territory. Following estimation of said norms, relationships between the State budget and the budgets of administrative-territorial units are then determined. A line-item budgeting is easily developed and has other advantages that were previously mentioned; however, it cannot meet the conditions of an economy based on market relations. The budget does not contain information

² *A practical guide for local public authorities on programme based budgeting methodology in Moldova.* Dan-ka Kovalova, Anna Baron, 14 March 2014 <http://www.mf.gov.md/files/files/Despre%20minister/InstrMFP/bugetara/Proiect%20de%20ghid%20practic%20.pdf>

on the Government's strategic directions to guide actions, and neither does it refer to expected outcomes.

Programme budgeting differs from the traditional line-item by its approach toward the development, analysis and presentation of budgetary information. Programme budgeting focuses on project and programme areas to be funded in the future, instead of detailing the types of goods and services to be procured. Moreover, programme budgeting emphasizes the expected outcomes from provision of services or works. Projects areas are very diverse, including maintenance of public order, public works, humanitarian aid, leisure and entertainment services for the population, etc. The purpose of program budgeting is to achieve long-term objectives proposed by the public administration.

Programme budgeting is a method of presenting and justifying budgets, based on programmes that contain goals, objectives and indicators used to assess their performance at all stages of the budgetary process. It is also an effective budget management tool that facilitates setting priorities and making decisions on the allocation of budgetary resources.

In programme budgeting, the emphasis is on the outcomes to be achieved through the envisaged/undertaken activities of budgeting authorities/institutions, thus linking budgetary expenditure to programmes and activities used to implement policy measures.

The main features of programme budgeting consist of:

- a) *the link to the policy framework*: the budget is structured along programmes that reflect the policy objectives set in the strategic planning documents for the medium and long term;
- b) *focus on performance*: in addition to financial information, programme budgeting includes non-financial information, as it establishes goals, objectives, and performance indicators;
- c) *increased accountability in the budgetary process*: programme budgeting involves the accountability of budgeting authorities/institutions for achievement of the performance assumed in the budgetary process;
- d) *multiannual perspective*: the programme budgeting presentation format comprises dynamic information, including the outcomes recorded for the last two years, the indicators approved for the current year and the projections for the next three years.

Programme budgeting³ allows for highlighting the envisaged results to be achieved through the activities carried out by public authorities and institutions financed from the budget. Having a clear picture of the desired outcomes of their activity makes it possible to identify effective solutions and methods to achieve the desired outcomes. Doing so ought to ensure a direct link of financial resources and expenditure with programmes and activities that implement policy measures.

³. As per Ministry of Finance Order No. 209 of 24 December 2015 approving the Methodological Kit on budget drafting, approval and amendment, *programme budgeting* is a method of presenting and justifying the budget, based on programmes that contain goals, objectives and indicators used to assess their performance at all stages of the budgetary process.

Programme budgeting is an effective management tool for setting priorities and making decisions regarding the future allocation of budgetary resources on the basis of results achieved.

Broadly speaking, the *programme* is a major activity or a group of activities established by an organisation with the aim of supporting and implementing a budgetary policy.

Within the budget structure, programmes and sub-programmes are integrated, inter-dependent and interlinked, while activities constitute an independent component and may therefore be applied to any programme / sub-programme.

Box 12.1.

Examples of programmes, sub-programmes and activities

| Programme | Subprogramme | Activities |
|---|--|---|
| Public Finance Management | <ul style="list-style-type: none"> • Public revenue management • Financial inspection • Public procurement management, etc. | <ul style="list-style-type: none"> • Execution and reporting of national public budget • Inter-budgetary relations • Public debt management • External audit, etc. |
| Transport Development | <ul style="list-style-type: none"> • <u>Road development</u> • Motor vehicle development, etc. | <ul style="list-style-type: none"> • <u>Implementation of public road construction, repair and maintenance programmes</u> • State support for motor transport, etc. |
| Public Education and Education Services | <ul style="list-style-type: none"> • <u>Early education</u> • <u>Lower secondary education</u> • <u>Vocational-technical secondary education</u> • <u>Teacher training courses/ Continuing education</u>, etc. | <ul style="list-style-type: none"> • <u>Lower secondary education</u> • <u>Maintenance of student houses/facilities</u> • Methodological work • Pre-primary, primary, lower and upper secondary education • Provision of textbooks • <u>Training courses</u>, etc |
| Social Protection | <ul style="list-style-type: none"> • <u>Protection of elderly people</u> • <u>Protection of children & family</u> • <u>Protection of the unemployed</u> • <u>Protection in the field of social housing provision</u>, etc. | <ul style="list-style-type: none"> • <u>Old-age pensions</u> • <u>Maintenance of shelters for the disabled and retirees</u> • <u>Social homecare services</u> • <u>Child-raising allowances</u> • <u>Maintenance of social day-care centres or care homes for children</u> • <u>Social protection measures for the unemployed</u>, etc. |

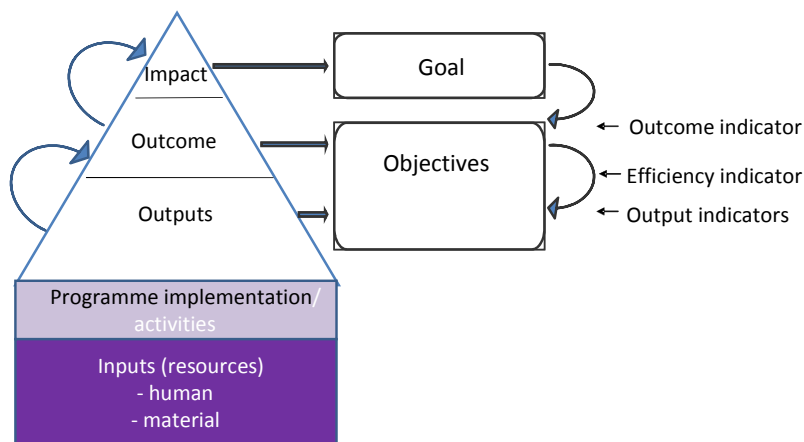
Note: items that refer (or may refer) to gender (in)equality aspects are underlined in the table.

Within programme/sub-programme structures, items should be *logically connected* both in the planning phase and in the implementation & monitoring phase. The

logical framework is a way to structure items so that the direct logical connections between them become obvious. The logical connection between programme items reflects the *top-down* approach in a programmes' development/preparatory phase and the *bottom-up* approach in a programme's implementation & monitoring phase, as shown in the figure below.

Figure 12.1. Programme logical framework

Source: **Ministry of Finance Order No. 209 of 24 December 2015 approving the Methodological**



Kit on budget drafting, approval and amendment.

To verify the correct establishment of a programme's structure, the following checking questions may be used:

- if the activities will be implemented, will be outputs be achieved?
- if the outcomes will be achieved, will the objectives be accomplished?
- if the objectives will be accomplished, will they contribute to reaching the goal?

In the event of a negative answer to even a single question, it will be required to remedy the mistakes by identifying alternative solutions.

Regular application of the logical framework in analysing the structure and relationships between programme/sub-programme items provides useful information for the monitoring and evaluation process, as well as facilitating decision-making on resource allocation.

The **goal** indicates the enhanced state of affairs or the effects that have a general impact on society, as well as the changes in economic and social fields, which are expected from the implementation of a public policy. It answers the question: "What is desired to be achieved?".

Box 12.2.**Examples of goal formulation**

| Programme | Sub-programme | Goal |
|---|---|--|
| Programme 05 “Public Finance Management” | 05.01. Budget and tax policies and management | Development and strengthening of public finance policy |
| | 05.02. Public revenue management | Stability , predictability and transparency of tax and customs management policies ensured |
| Programme 64 “Transport Development” | 64.02. Road development | Public road infrastructure developed and maintained in maximum-security conditions |
| Programme 88 “Public Education and Education Services” | 88.04. Lower secondary education | <u>Quality lower secondary education needed for teaching general knowledge and for orientation toward higher education</u> |
| | 88.10 Higher education | Qualified staff trained by higher education institutions |
| Programme 90 “Social Protection” | 90.08. Protection of the unemployed | <u>High degree of people’s involvement in active employment measures</u> |

Note: items that refer (or may refer) to gender (in)equality aspects are underlined in the table.

The **objectives** should be linked to sectoral strategies on expenditure and medium-term development plans. They answer the question “How will the intended goal be reached?”.

The objectives reflect the expected direction of change and progress over a certain time period. They have an operational character and should present in as concrete a fashion as possible the actions that are planned to be undertaken and the deadline for implementation thereof, in order to reach a sub-programme’s goal.

The objective will be considered to be well-formulated if it meets the requirements set out in the box below.

Box 12.3.**Requirements for setting objectives**

| Requirements | Explanation |
|-------------------------------|--|
| Goal-adjusted | Must be linked to the defined goal and must contribute to reaching the goal / solving the problem identified |
| Time-specific | Must determine the specific term or period during which the outcome / problem is to be achieved / solved. May be set over the medium term, with the establishment of intermediate objectives for each year |
| Measurable/ Verifiable | Must allow for monitoring progress toward reaching the goal, as well as for verifying information |

| Requirements | Explanation |
|------------------------|---|
| Concise (clear) | Must be succinctly, clearly and concretely formulated, so as to explicitly convey the proposed objective's essence |
| Manageable | Must provide clarity as to who is responsible for the outcome undertaken. Where achievement of the objective depends on more than one authority, responsibilities must be clearly delineated. |
| Achievable | Carrying out of an analysis to determine if there exist available resources and capacities to achieve the objective. Must identify risks that may arise in achieving the objective and corresponding mitigation measures |

Depending on the target and the time period for their expected achievement, **objectives may be grouped** into:

- a.) *outcome-focused objectives* – relating to certain positive effects planned to be achieved over the medium term (2-3 years);
- b.) *output-focused objectives* – directly relating to the planned outputs and set for the short term (usually 1 year).

Where an objective reflects a target over the medium term, interim values of targets for each budget year should be indicated.

Box 12.4.

Examples of objectives

| Programme/ sub-programme | Goal and objectives |
|---|--|
| <p><i>Programme:</i> “Public Finance Management”</p> <p><i>Sub-programme:</i> „ Policies and management in the budget and tax sector”</p> | <p>Goal: Development and strengthening of public finance policy</p> <p>Objectives:</p> <ul style="list-style-type: none"> • Gradual implementation of programme budgeting methodology, with full implementation in year X • Strengthening the multiannual strategic budget planning process, ensuring maximum consistency between MTBF and annual budget laws • <u>Gradual decline in the degree of gender inequality in the allocation of budgetary resources</u> |

| Programme/ sub-programme | Goal and objectives |
|---|---|
| Programme: "Transport Development" Sub-programme: "Road Development" | Goal: Public road infrastructure developed and maintained in maximum-security conditions Objectives: <ul style="list-style-type: none">• Rehabilitation of national public roads at x% and of local roads at y% by year X• Decrease in the number of traffic accidents by x% by year X• <u>Increasing the share of social institutions provided with road infrastructure by x% by year Y</u> |
| Programme: "Public Education and Education Services" Sub-programme: "Vocational-technical secondary education" | Goal: Developed skills and professional competencies specific to the training of skilled workers for sectors of the national economy Objectives: <ul style="list-style-type: none">• Increasing access to quality education by creating y centers of professional excellence by year X• Enhancing the quality of education through development of Y occupational standards by year X• <u>Increasing the number of gender sensitive specialties within vocational-technical education</u>• <u>Decrease in the degree of gender inequality among students</u> |
| Programme: "Social Protection" Sub-programme: „Protection of the unemployed" | Goal: Increased degree of people's involvement in active measures of employment Objectives: <ul style="list-style-type: none">• Increasing the employment level of registered unemployed by x% compared to the previous year• Annual employment of at least x% of training, re-training and upskilling graduates• <u>Decrease in the degree of gender inequality within the ranks of formerly unemployed employees</u> |

Note: items that refer (or may refer) to gender (in)equality aspects are underlined in the table

Programme/sub-programme performance is expressed by means of indicators, the purpose of which is to measure progress in achieving programme/sub-programme objectives. **Performance indicators** represent a concrete value or a unique feature which is used to measure activities, outputs and outcomes in relation to established objectives.

In formulating programmes/sub-programmes, **three indicator categories** will be used:

a.) Output indicators – indicate the amount or volume of public goods produced or of services provided under the programme/sub-programme in order to achieve the objectives. Output indicators are a direct result of the institution's activities in the process of programme implementation. Outputs are measurable in terms of both quantity and quality. Output indicators are used to assess financing needs and to determine the resources required for a given programme/sub-programme.

b.) Efficiency indicators – characterise a programme/sub-programme's efficiency and express the relationship between produced goods, services provided and the resources used to produce or provide them. Typically, efficiency indicators express the average amount of resources (such as time or cost) consumed in order to obtain an output or outcome unit.

c.) Outcome indicators – reflect the degree a programme/sub-programme's goal achievement and characterise the quality of their implementation. Outcome indicators are of particular importance for public policy analysis, as they assess a programme/sub-programme's impact, along with highlighting its achieved economic and social changes. The results, however, are sometimes difficult to measure and largely depend on the influence of external factors. When setting out outcome indicators, it is recommended to use assessment criteria, as well as to determine the degree of compliance with various national and international quality standards or the results of certain studies, surveys, etc.

For each sub-programme, at least one indicator for each category shall be set.

The set of performance indicators, as prioritized according to goals and objectives, should provide a complete vision of the programme/sub-programme and should cover all its major activities.

In formulating performance indicators, the following **requirements** should be considered:

- a.) have to be relevant to the institution's activity and to provide useful information to both decision-makers and the general public;
- b.) have to result from the objectives set, while focusing on outputs or outcomes;
- c.) have to be explicit and verifiable, their calculation method and the source of information gathering have to be known;
- d.) have to be timely and comparable over time;
- e.) have to be correlated with costs and available resources.

Examples of performance indicators

| Programme / sub-programme | Performance indicators |
|---|--|
| <p>Programme: “Transport Development”</p> <p>Sub-programme: „Road Development”</p> <p>Goal:</p> <p>Public road infrastructure developed and maintained in maximum-security conditions Objective:</p> <ul style="list-style-type: none"> - Rehabilitation of national public roads at x% and of local roads at y% by year X - Decrease in the number of traffic accidents by x% by year X - <u>Increasing the share of social institutions provided with road infrastructure by x% by year Y</u> | <p>Output indicators:</p> <ul style="list-style-type: none"> • Kilometers of constructed road; • <u>Number of social institutions provided with road infrastructure</u> • <u>Share of social institutions provided with road infrastructure in the total number of social institutions</u> • Efficiency indicators: • Average cost of maintenance and repair for 1 km of road; • <u>Average time used to access social institutions</u> • Outcome indicators: • Share of rehabilitated roads in relation to total road length; • Degree of population satisfaction with the quality of roads (%); • <u>Degree of gender-disaggregated population satisfaction with road infrastructure provision (%)</u>. |
| <p>Programme: “Public Education and Education Services”</p> <p>Sub-programme: “Upper secondary education”</p> <p>Goal:</p> <p>Quality upper secondary education</p> <p>Objective:</p> <ul style="list-style-type: none"> - Increasing the bacculaureate promotion rate by x% by year Y | <p>Output indicators:</p> <ul style="list-style-type: none"> • <u>Gender-disaggregated</u> number of students enrolled; • Efficiency indicators: • <u>Gender-disaggregated</u> average expenditure for training a student; • Outcome indicators: • Bacculaureate promotion rate, • <u>Baccalaureate promotion rate among girls / boys</u>. |

Note: items that refer (or may refer) to gender (in)equality aspects are underlined in the table

When establishing performance indicators the opportunities and risks related to data collection should be taken into account.

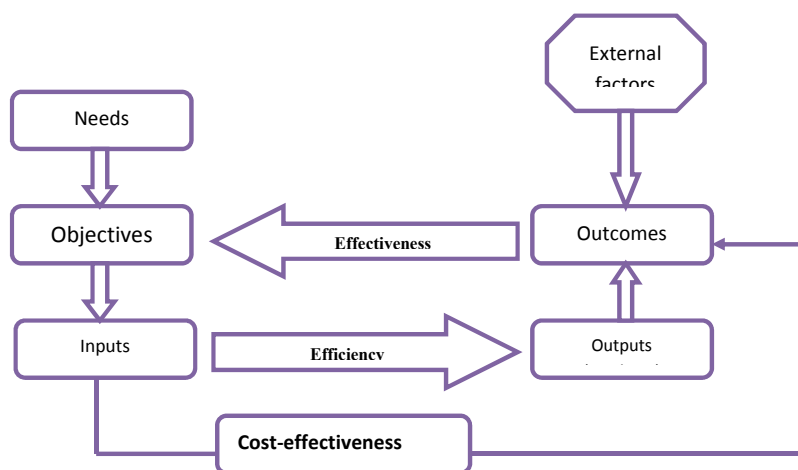


Figure 12.2. Relationships between performance indicators

If during the programme implementation process the need arises to amend or supplement the list of performance indicators, an assessment of the impact of respective changes on existing indicators will be performed so as to ensure the indicator's comparability over time. This, however, should not hinder the selection of new indicators; instead, it may be supplemented with gender issues.

One of the most relevant examples for Moldova would be the experience of Austria, which passed through virtually the same stages of reforms in the budgetary process, and even has several identical budget items. Obviously, an adaptation of Austrian methodology to the national context is in order.

The main stages of initiating gender responsive budgeting in Austria were:

- creating a target group for gender dimension and budgeting integration;
- providing an inventory of existing data resources and knowledge base;
- identifying issues that require further analysis (based on the conducted inventory);
- using the analyses to start GRB piloting with one of the country's ministries.

The introduction of effectiveness- and performance-based management has enabled Austria to obtain the following benefits:

- increased *transparency* within the political goals and achievements of governance;
- increased *outcome-orientation* in the political and administrative fields;
- improved *efficiency and performance* in public achievements;
- increased attention to *equality between women and men* within administrative actions;
- foundation for an *integrated control system* (establishing the link between

inputs, outputs and outcome achievement).

Although containing similarities to the programme-based budgeting process introduced in Moldova, the budgeting cycle in Austria also contains some differences. For instance, five main objectives are developed for each programme that each Austrian ministry should identify as priorities, whereas one of the five must necessarily be linked to gender equality. This rule is mandatory and provided for by law. A set of indicators is drawn up and implemented for each programme in order to measure the achievement of each objective. Gender plays a crucial role, in particular with regard to the objective concerning gender equality.

With the introduction of five major outcomes, decision-makers are asked to prioritize their activities. In fact, every outcome may have several sub-outcomes. For instance, the “reduced unemployment rate” outcome (or increased qualification of the unemployed), may have as a goal “how many people will be trained or retrained” (including gender-disaggregation). Therein, several (3-7) sub-outcomes or interim outcomes may be integrated – such as organizing a certain number of courses or seminars using “for men and women” disaggregation, and specifying how many for rural and for urban areas. Similarly, as a sub-outcome, one may mention the counselling or mediation process for people who are in search of employment, which also contributes to the goal pursued.

Thus, taking Austria’s experience into account – particularly the advantages of GRB introduction – we may assert that it fits well into the strategy of budgetary process reforming, which involves the introduction of performance budgeting and contributes to its implementation.

12.3. Integration of gender sensitive indicators within programme budgeting

The examples discussed above demonstrate the real possibilities for use of gender indicators both at different stages of the programmes/projects developed according to the **outcome-based management approach**⁴ and in various other programmes/projects. The following section provides an indicative list of indicators taken from programmes/projects in the areas of healthcare, media, education, etc., which are recommended to be applied in the drafting of programmes/projects as well as in the preparation and holding of seminars on this topic for various categories of users.

The use of these gender indicators involves different stages of programmes/projects.

Resource indicators

Resource indicators refer to resources devoted to a project or programme, such as financial, material and human resources, as well as infrastructure or institutional structure. They also relate to other means by which a program or project is carried out.

Resource indicators play an important role in identifying potential problems and in

⁴. This method underlies the programme budgeting used in Moldova’s budgetary process.

detecting their causes; however, they are not sufficient to determine whether or not a project or a programme will be successful. These indicators merely measure the amount of resources required for implementing a programme/project (financial, material and human resources, infrastructure, institutional capacity).

Here are some examples of resource indicators:

- ❖ Administrative support for gender equality, including experts and teams in the field of gender equality, allocation of gender responsive budgeting.
- ❖ Approaches/processes in examining issues of gender equality, along with the tools/methodologies used (capacity to collect information, presence of various information sources, databases, etc.);
- ❖ Gender-disaggregated structure of employees at various levels of the organization.
- ❖ The amount of resources and the potential of women/men involved in programme/project implementation at different levels (Government departments, NGOs, key local actors).
- ❖ Number of meetings on issues of joint programme/project planning and implementation held with local participants (both men and women).
- ❖ Attendance by key local actors of meetings/assemblies devoted to programme/project planning and implementation (data processed in view of gender, socio-economic, age and ethnic differences).
- ❖ Levels of key local actors' contribution/participation in local meetings/assemblies on issues of joint programme/project planning and implementation.
- ❖ Levels of key local actors' participation in the baseline study.
- ❖ Contribution of women and men in terms of labour, tools, financial resources, etc.
- ❖ Maintenance of technical devices by women/men.
- ❖ Existence of adequate sanitation and hygiene working conditions for men and women.
- ❖ Employment of key actors in the programme/project – men and women (% of time).
- ❖ Valuation of both men and women-leaders' views/opinions.

External factor indicators (risk factors / favourable factors)

Measuring the impact of external factors (both positive and negative) on the programme/project:

At all stages of its lifecycle, the programme/project may experience the impact of various unfavourable (negative, risk) factors or favourable (positive) factors. Thus, *unfavourable (risk) / favourable factors are understood to include circumstances that are external to the programme/project and that contribute to a programme/project's*

success – or, on the contrary, leads to its failure.

Risk / favourable factor indicators include a range of socio-economic factors and external environmental factors, such as operation and work of relevant institutions and of the legal system, as well as socio-cultural practices. To give an example, in programmes/projects aimed at increasing revenues, risk indicators may comprise the attitude of local authorities or local elites, or the manufactured products' marketing potential. Like all indicators, they must be developed in collaboration with key stakeholders, because end users are better informed about potential favourable and unfavourable factors to programme/project implementation.

Here are some examples of external factor indicators:

- ❖ Local environment and context, presence/absence of conditions for gender equality (Government policies and strategies, institutional framework, legislation).
- ❖ Local factors that hinder or support gender equality efforts (local community's support/opposition, culture, traditions, customs).
- ❖ Stereotypes of thinking.
- ❖ Administrative instructions/provisions.
- ❖ Previous successes/failures in implementing policies / programmes / projects.
- ❖ Level of government support for local participation.
- ❖ Level of programme/project support by various segments of the local population (men, women, local elite).
- ❖ Involvement of various population groups in the programme/project.
- ❖ Reduction in long-term donor commitment.

Programme/project achievement indicators (interim, direct & process based outcomes)

These indicators measure: the outcome of each of the programme/project's activities; the resource allocation for all programme/project phases/activities; the progress made during programme/project implementation; the progress made in achieving the programme/project's objectives.

They are applicable for each activity category and are used to monitor the programme/project.

In fact, such indicators reflect the long-term distribution of resources allocated to a given programme or project, constitute the most reliable implementation indicators and are used to monitor the programme/project (in terms of products or services occurring during its implementation), but are less useful than impact indicators, because they do not matter to final outcomes over the long term and, as such, should not substitute their measurement. While the process may be successful, the success of the final outcome is not yet guaranteed.

Here are some examples of programme/project achievement indicators:

- ❖ Proportion of women included in delegations – including visits to share experiences on policy formulation – in the total number of persons to which the policies apply within their respective institutions, and in the number of people involved in training programmes/projects.
- ❖ Dynamics of approaches/processes concerning the examination of gender equality issues, as well as developed tools/methods (implementation of regular gender-disaggregated information collection, expanding of information sources, database updating, etc.).
- ❖ Dynamics of administrative support for gender equality, including relevant specialists and groups in the field (increase/decrease in number).
- ❖ Integration of gender equality principles in different stages of the programme/project (strategy development, planning, implementation, monitoring and evaluation).
- ❖ Dynamics of decision-making processes/mechanisms within the organization (who is involved?, what mechanisms are used?, who makes decisions?) in terms of gender equality.
- ❖ Existence of “participatory-style” corporate rules and the degree of involvement of women and men in their development.
- ❖ Frequency of women and men’s participation in events. Participants’ (men and women) degree of satisfaction with programme/project activities.
- ❖ Number of women and men in key decision-making positions. Rotation of both genders in administrative positions.
- ❖ Gender disaggregation of committed appropriations, levels of schooling, and numbers of visits to clinics to determine their increase or decrease from the programme/project’s onset.
- ❖ Dynamic growth in the number of organized groups of women and men.
- ❖ Rate of increase or decrease in the number of members of NGOs, other structures/agencies, by gender.
- ❖ Existence of gender components in strategic plans.

Final outcome indicators

These indicators measure the outcomes corresponding to the programme/ project’s goal, outcomes at a more advanced stage, as well as the main changes in families, organizations and society caused by the programme/project throughout its period.

Here are some examples of final outcome indicators:

- ❖ Gender-sensitive restructuring of an organization/institution’s staff at different levels of administration.
- ❖ Expansion of formal and informal relationships (partnerships, networking, communications) to other organizations, other donors, NGOs, women’s groups, women-leaders of local communities.
- ❖ Strengthening / weakening of partnerships and of associated opportunities.

- ❖ Institutionalization of dialogue and consultations with community representatives, activist groups, service users (disaggregated by gender).
- ❖ Introduction of mediation mechanisms for resolving gender issues.
- ❖ Improvement of administrative and organizational management.
- ❖ Drafting of gender-sensitive guidelines, methods, teaching materials and integration thereof into curricula at all levels.
- ❖ Development and implementation of gender-disaggregated training & upskilling programmes.
- ❖ Changing the statuses of men and women after them having obtained new skills/abilities.
- ❖ Changing the behaviour of trained participants (degree of gender sensitivity within the collective / programme/project team).
- ❖ Changes in the working hours of staff members (both men and women) who help increase productivity.

Impact indicators (for final outcomes)

These indicators relate to programme/project effectiveness (often over the long term), determined through measurable changes obtained which improve beneficiaries' quality of life after termination of donor support.

In most cases, priority in the use of indicators should be given to the impact, as it best reflects the programme/project's long-term outcomes.

Here are some examples of impact indicators:

- ❖ Establishment of national/regional political structures for planning and implementation of strategies/programmes on gender equality.
- ❖ Integration of gender components in the drafting of strategy for monitoring and evaluation of national, regional and local programmes.
- ❖ Establishment of gender sensitive systems for provision of healthcare, educational, environmental and other services.
- ❖ Awareness of gender equality issues within certain sectors of society, the family, organizations, etc.
- ❖ Integration of gender component in the mission/mandate of organizations, institutions, ministries, departments, etc.
- ❖ Possibilities to extend best practices accumulated so as to integrate gender equality in other programmes/projects.
- ❖ Depth, regularity and complexity of the analysis of sociocultural barriers and mechanisms to resolve gender issues at different levels of society.
- ❖ Change of existing gender stereotypes.

As is apparent from the above examples, indicators types are sometimes difficult to separate one from the other. At international level, it is suggested to use a chain of

indicators consisting of the following fragments and based on a logical frame structure, throughout which the same terminology is used – *“the means and resources, the direct outcomes, the final outcomes and the impact.”* In practice, it is clear that terms such as “process” or “direct outcomes” concerning indicators are not as important as a clear understanding of the object measured using indicators. Another key aspect to point out is that *indicators should cover all monitoring & evaluation stages in the course of the programme/project cycle.*

The programme/project achievement indicators (direct & process based outcomes) and the impact indicators can be compared against each other and against the reference data so as to determine the extent of progress toward the agreed objectives. In some cases, the same indicator is used to monitor the project’s implementation progress and its impact (e.g. data from lists processed by gender, literacy level or the local community’s level of satisfaction with the programme/project), while differences between indicators are used in accordance with the time at different points in the programme/project’s cycle.

Inclusion of the gender component is the “added value” in the process of mobilization and allocation of public financial resources meant to achieve society’s sustainable development objectives.

Checklist

- 1. What is line-budgeting?**
- 2. What is a programme budget?**
- 3. What is programme budgeting?**
- 4. What are the main features of the program budget?**
- 5. What is a programme?**
- 6. What is a sub-programme?**
- 7. What do activities within a sub-programme reflect?**
- 8. What are a programme’s components?**
- 9. What is the narrative description of a programme (sub-programme)?**
- 10. What is the goal a programme (sub-programme)?**
- 11. What is the objective of a programme (sub-programme)?**
- 12. What are the performance indicators of a programme (sub-programme)?**
- 13. What do the output indicators used in formulating the programme (sub-programme) indicate?**
- 14. What do the efficiency indicators used in formulating the programme (sub-programme) indicate?**
- 15. What do the outcome indicators used in formulating the programme (sub-programme) indicate?**
- 16. What requirements must be taken into account when formulating performance indicators?**

- 17. Lay down a succession of programme items (programme – sub-programme – activities – performance indicators) by inclusion of gender equality aspects.**
- 18. Why studying the programme budgeting model could be useful for people in government as well as to people outside government?**
- 19. What is the usefulness of the MTBF as a multiannual programme budgeting system from the GRB perspective?**
- 20. Why can the Austrian experience be regarded as a challenge for Moldova's integration of gender issues in the budgetary process?**
- 21. Why are gender-sensitive indicators necessary?**
- 22. What is the specificity of gender sensitive indicators?**
- 23. How are gender sensitive indicators used in performance-based programme budgeting?**
- 24. What are the criteria for selecting the gender indicators?**
- 25. What types of gender indicators are there?**
- 26. Provide examples of gender indicators for each stage of the programme/project cycle.**

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GLOSSARY

Gender approach – the gender approach or theory has three major directions.

The theory of social construction of gender is based on two principles: 1) gender is constituted through socialization, division of labour, a system of gender roles, family, media; 2) gender is constructed by individuals themselves by accepting the rules and roles imposed by society.

Gender as a way of stratifying the society is one of the models of power relations in society. It is analysed in combination with other categories, such as class, race, nationality, etc.

Gender as a symbol of culture. The biological sexual differentiation is represented in culture by the symbols of masculine or feminine origins. Thus, “the manly”/“masculine” is associated with the divinity, creation, light, rationality, while “the womanly”/“feminine” is associated with nature, darkness, subordination, chaos, passivity.

Gender analysis – study of differences between men and women regarding conditions, needs, participation rates, access to resources and development, participation in decision-making; analysis and assessment of policies and programmes in terms of their compliance with gender equality principles. The essence of gender analysis is to monitor the effects of adopted political, economic, social decisions on men and women; therefore, gender analysis should become an integral part of social and economic analysis of the state policy.

Gender asymmetry – unequal representation of women and men in various areas: thus, men prevail in the state leadership, politics, decision-making,

large and medium businesses, while women prevail in low-paid sectors.

Gender responsive budget analysis – analysis of impact of (governmental) revenues and expenditure on the social status and opportunities of women and men, girls and boys and on their social relations. Gender responsive budget analysis helps adopt decisions on the ways of changing policies to achieve a maximum impact, as well as ways of re-allocating resources to achieve gender equality and human development.

Budget – a plan on how to obtain and spent money over a certain period or for a specific activity. It is the most important policy tool of the government because, without money, the government cannot implement successfully any policy.

Gender responsive budget – a new social technology that:

- assumes integration of the principle of differentiated highlighting of interests according to socio-sexual interests in the Government's policy;
- allows to take into account the interests of women and men in social policy in order to predict potential social effects of adopted economic decisions;
- implies the integration of a gender perspective in the budgetary process;
- ensures that the needs and interests of individuals from different social groups (sex, age, race, ethnicity, and location) are addressed in expenditure and revenue policies.

Gender responsive budget does not represent:

separate budgets for women or men (these are rather budgets that entail a sense of awareness of the gender issues in policies, plans, programmes and budgets of all government agencies);

a share of 50% for men: 50% for women (it refers to a way of budgeting that intentionally directs resources and collects revenues in a manner that addresses issues related to disadvantages and exclusion).

Programme budgeting – a programme of major activities (groups of activities), for which goals, objectives, a narrative description and performance indicators are defined and for which resources are allocated.

Biodeterminism – the individual is determined by biology and physiology, underlying differences between the manly/masculine and the womanly/feminine.

Medium Term Expenditure Framework is:

- a strategic and comprehensive method of planning public revenues and expenditures;

- a tool for correlating governmental policies and strategies with resource allocation;

- a document approved every year by the Government, which defines the budgetary and tax policy for the medium term.

Discrimination – less favourable treatment of an individual because of his/her sex. Direct discrimination: unequal attitude and appreciation towards women and men based on legislation and regulatory documents. Indirect discrimination – rules and practices that, at first glance, seem to be neutral in terms of gender, but which actually harm the representatives of a sex (e.g., a vacancy advertising “seeking to employ a woman/a man”)

Women’s emancipation/empowerment – originally it referred to liberation of slaves from the master’s domination. Since the middle of the 19th century, emancipation was used with respect to

the movement of women for their legal rights. Emancipation/empowerment means independence, the liberation from moral and social conventions.

Gender equality is based on the assumption that men and women should be treated in the same manner. It does not acknowledge that equal treatment fails to generate fair outcomes because women and men have different life experiences.

Gender equity considers the differences in the lives of women and men and acknowledges that different approaches are needed to generate fair outcomes.

Feminism is a term that comes from the Latin word *femina* (woman) and stands for the protection of women’s rights both in theory and in practice. Feminism is the ideology of equality between women and men, a theory that seeks to determine the social foundations of inequality and to propose ways to address it.

Liberal feminism is the first feminist movement that believes that the reason for women’s inequality lies in women’s deprivation of political and socio-economic rights. To resolve this problem, economic, social and legal reforms are needed to ensure equality between women and men.

Radical feminism – the reason of women’s oppression is patriarchy, the system of domination of men over women. The key principle implies that the society builds the manly/masculine as a positive cultural norm, while the womanly/feminine – as a deviation from the norm.

Femininity – refers to a society’s ideas about the roles, behaviours and attributes that are considered appropriate for women and associated with femaleness.

Gender – a social construct, a set of characteristics determined by culture, which identifies the social behaviour of

men and women, as well as relations between them. Gender is built through socialization, division of labour, norms, roles, cultural stereotypes accepted by the society.

Gender identity – the process of becoming aware and accepting the characteristics of masculinity and femininity existing in a certain culture, in which a person is born and grows; assigning an identity to women or men and using gender roles and gender representations (I am a man, I am a woman).

Performance indicators – a specific value or feature used to measure activities, outputs and outcomes against objectives.

Output indicators show the quantity or volume of public goods produced or services provided under a programme/sub-programme to achieve objectives. Output indicators are generated directly by the activities of an entity in the course of programme implementation.

Efficiency indicators describe the efficiency of a programme/sub-programme and show the relationship between the goods and services provided and the resources used to provide them.

Outcome indicators show the extent to which the goal and objectives of the programme/sub-programme are met and describe the quality of its implementation. Outcome indicators are particularly important for public policy analysis, as they assess the impact and point out the economic and social changes made by the programme/sub-programme.

Gender responsive budget initiatives – initiatives focused on examining and analysing budgets to assess the implications for (different groups of) women and men, and on developing gender equality strategies.

Masculinity – refers to the roles, behav-

iours and attributes that are associated with maleness and considered appropriate for men.

Budget planning – planning of revenues and expenditures over a certain time and setting priorities.

Gender responsive budget planning – applying the gender perspective to budget plans and to the budget planning process, by considering the needs and priorities of (different groups of) women and men, taking into account their different roles at home, at the workplace or in the society.

Budget and tax policy – a policy aimed at amending public expenditure and revenue in order to maintain the economic balance and stimulate the development of some national economy branches.

Tax policies – government policies, in which taxes are used to achieve certain political goals, such as redistribution of income, economic growth, equity and sustainable development.

Budget process – an activity of public authorities for the development, review, approval, execution and conclusion of central and local budgets, as governed by the law.

Programme – a sequence of specific operations, which serve as a tool for policy implementation and contain clearly defined objectives, required resources, predefined target groups and deadlines.

Gender relations – relations characterized by inequitable distribution of power, resources and rights between men and women.

Gender revolution – change of demographic, socio-cultural, marital, tutorship and parental standards.

Gender roles – behaviours associated by the society with each sex. They are shown through behaviours, areas of ac-

tivity, manners, gestures, etc., which are identified by the society as feminine or masculine.

Gender segregation refers to the men's or women's tendency to work in different sectors, professional categories and occupations.¹

Sex - anatomical and physiological (biological) characteristics, according to which individuals are divided into men and women.

Gender system – all social institutions, ideologies and cultural norms that determine people's behaviour, roles, conscience and interaction according to sex. The gender system reflects the opinions and expectations related to individuals depending on their sex.

Gender socialization – application by an individual of socio-cultural norms and rules of behaviour accepted by the society, acquisition of norms and patterns of "masculinity" and "femininity". The gender socialization process involves, on the one hand, the acquisition of accepted patterns of gender behaviour, relations, values, norms, stereotypes of men and women and, on the other hand, the influence of the society and social environment on the acceptance of norms by monitoring and sanctioning the individual.

Gender stereotypes – systems of beliefs, views and opinions about the characteristics of women and men in relation to the desirable traits of masculinity and femininity. The characteristics associated with women and men are not only descriptive, but also normative. They show not only how men and women are perceived, but also how they should be. They show the characteristics and behaviours fit for the "true

women" or "true men".

Gender stratification – the process of social stratification (division) of individuals by sex. Regardless of the norms and roles of women and men in a specific culture, women and "womanly" issues are appreciated and remunerated lower as compared to men.

Gender studies – an interdisciplinary scientific approach in the analysis of gender systems and gender relations; use of the gender approach to study social, cultural, economic and political phenomena and processes.

¹. Maria Andonie, Studiu privind segregarea de gen pe piața muncii, Editura Fundației România de Măine, București, 2012.

ANNEXES

Annex 1.

Resident population, by area, age group and sex in the Republic of Moldova in the period 2010-2015 (at the beginning of the year, persons)

| Years | Indicators | Urban | | Rural | |
|-------|---------------------------------|--------|--------|---------|---------|
| | | B | F | B | F |
| 2010 | Under working age (0-15 years) | 117490 | 109865 | 215534 | 206173 |
| | Working age (16-56/61 years) | 515600 | 527238 | 698372 | 630046 |
| | Over working age (57/62+ years) | 61379 | 145109 | 105112 | 231777 |
| | TOTAL | 694469 | 782212 | 1019018 | 1067996 |
| 2011 | Under working age (0-15 years) | 116303 | 107802 | 210080 | 200875 |
| | Working age (16-56/61 years) | 516879 | 525921 | 702161 | 629791 |
| | Over working age (57/62+ years) | 63549 | 151242 | 103134 | 232693 |
| | TOTAL | 696731 | 784965 | 1015375 | 1063359 |
| 2012 | Under working age (0-15 years) | 114966 | 106540 | 205937 | 196567 |
| | Working age (16-56/61 years) | 516413 | 522344 | 702867 | 627956 |
| | Over working age (57/62+ years) | 66873 | 158630 | 104669 | 235779 |
| | TOTAL | 698252 | 787514 | 1013473 | 1060302 |
| 2013 | Under working age (0-15 years) | 114510 | 105908 | 202485 | 193007 |
| | Working age (16-56/61 years) | 516312 | 519231 | 701434 | 624936 |
| | Over working age (57/62+ years) | 70685 | 165519 | 106920 | 238550 |
| | TOTAL | 701507 | 790658 | 1010839 | 1056493 |
| 2014 | Under working age (0-15 years) | 114401 | 106026 | 199719 | 189866 |
| | Working age (16-56/61 years) | 517096 | 516840 | 696129 | 619105 |
| | Over working age (57/62+ years) | 75027 | 173606 | 109134 | 240685 |
| | TOTAL | 706524 | 796472 | 1004982 | 1049656 |
| 2015 | Under working age (0-15 years) | 114462 | 106026 | 198206 | 188340 |
| | Working age (16-56/61 years) | 514649 | 512534 | 692052 | 612738 |
| | Over working age (57/62+ years) | 78924 | 180670 | 111951 | 244607 |
| | TOTAL | 708035 | 799230 | 1002209 | 1045685 |

Source: NBS

Annex 2.

Aging coefficient, by year, area and sex in the Republic of Moldova in the period 2010-2015

(number of people aged 60 years and over per 100 residents)

| Years | Country's total | | | Urban | | | Rural | | |
|-------|-----------------|------|------|------------|------|------|------------|------|------|
| | Both sexes | M | W | Both sexes | M | W | Both sexes | M | W |
| 1991 | 12,8 | 10,4 | 15,0 | 10,1 | 7,9 | 12,1 | 15,3 | 12,7 | 17,6 |
| 1992 | 12,9 | 10,4 | 15,1 | 10,0 | 7,9 | 12,0 | 15,3 | 12,8 | 17,7 |
| 1993 | 13,1 | 10,6 | 15,3 | 10,2 | 8,0 | 12,2 | 15,6 | 13,0 | 18,0 |
| 1994 | 13,0 | 10,6 | 15,2 | 10,2 | 8,0 | 12,1 | 15,5 | 12,9 | 17,9 |
| 1995 | 13,1 | 10,7 | 15,3 | 10,1 | 8,1 | 12,1 | 15,6 | 13,0 | 18,0 |
| 1996 | 13,1 | 10,7 | 15,3 | 10,2 | 8,2 | 12,2 | 15,6 | 12,9 | 17,9 |
| 1997 | 13,3 | 10,8 | 15,5 | 10,4 | 8,3 | 12,3 | 15,7 | 13,0 | 18,1 |
| 1998 | 13,5 | 11,1 | 15,6 | 10,5 | 8,5 | 12,3 | 15,6 | 12,9 | 18,0 |
| 1999 | 13,7 | 11,3 | 15,8 | 10,8 | 8,9 | 12,7 | 15,7 | 13,1 | 18,1 |
| 2000 | 13,6 | 11,2 | 15,9 | 11,0 | 9,0 | 12,9 | 15,5 | 12,8 | 17,9 |
| 2001 | 13,6 | 11,2 | 15,9 | 11,2 | 9,2 | 13,1 | 15,3 | 12,5 | 17,8 |
| 2002 | 13,9 | 11,4 | 16,2 | 11,6 | 9,6 | 13,5 | 15,5 | 12,7 | 18,0 |
| 2003 | 13,9 | 11,4 | 16,2 | 11,8 | 9,8 | 13,6 | 15,4 | 12,5 | 18,0 |
| 2004 | 13,8 | 11,2 | 16,1 | 11,8 | 9,8 | 13,6 | 15,2 | 12,2 | 17,8 |
| 2005 | 13,6 | 11,0 | 15,9 | 11,8 | 9,9 | 13,6 | 14,8 | 11,8 | 17,5 |
| 2006 | 13,2 | 10,7 | 15,6 | 11,8 | 9,8 | 13,6 | 14,3 | 11,3 | 17,0 |
| 2007 | 13,7 | 11,2 | 16,0 | 11,6 | 9,7 | 13,3 | 15,2 | 12,2 | 18,0 |
| 2008 | 13,7 | 11,2 | 16,0 | 12,0 | 10,1 | 13,7 | 14,9 | 11,9 | 17,7 |
| 2009 | 14,0 | 11,5 | 16,4 | 12,7 | 10,8 | 14,3 | 15,0 | 12,0 | 17,9 |
| 2010 | 14,4 | 11,8 | 16,8 | 13,2 | 11,3 | 15,0 | 15,2 | 12,2 | 18,1 |
| 2011 | 14,8 | 12,2 | 17,3 | 13,9 | 11,8 | 15,7 | 15,5 | 12,4 | 18,4 |
| 2012 | 15,3 | 12,6 | 17,8 | 14,6 | 12,4 | 16,5 | 15,8 | 12,8 | 18,7 |
| 2013 | 15,7 | 13,0 | 18,3 | 15,2 | 12,9 | 17,3 | 16,1 | 13,0 | 19,0 |

Since 1997, data are presented without the population on the left bank of the Nistru River and the city of Tighina

Data for 2006 are calculated based on the 2004 Population Census

Source: NBS

Annex 3.

Active and employed population aged 15 years and over, by sex and area in the Republic of Moldova in the period 2010-2015

(annual average)

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---------------|---------------|---------------|---------------|---------------|---------------|
| Active people, both sexes, country's total | 1235,4 | 1257,5 | 1214,5 | 1235,8 | 1232,4 | 1265,6 |
| Urban | 595,7 | 606,8 | 597,6 | 587,3 | 567,4 | 593,5 |
| Rural | 639,6 | 650,8 | 617 | 648,6 | 665 | 672,1 |
| Active men, country's total | 630,6 | 642,3 | 618,4 | 630 | 625,5 | 639 |
| Urban | 301,6 | 304,7 | 304,2 | 298,4 | 285,1 | 291,4 |
| Rural | 328,9 | 337,6 | 314,2 | 331,7 | 340,4 | 347,6 |
| Active women, country's total | 604,8 | 615,3 | 596,1 | 605,8 | 606,9 | 626,6 |
| Urban | 294,1 | 302,1 | 293,4 | 288,9 | 282,3 | 302,2 |
| Rural | 310,7 | 313,2 | 302,7 | 316,9 | 324,6 | 324,5 |
| Employed people, both sexes, country's total | 1143,4 | 1173,5 | 1146,8 | 1172,8 | 1184,9 | 1203,6 |
| Urban | 538,3 | 556,8 | 554 | 550,5 | 538 | 555,3 |
| Rural | 605 | 616,7 | 592,8 | 622,3 | 646,9 | 648,3 |
| Employed men, country's total | 573,3 | 592,6 | 576,2 | 592,1 | 596,6 | 599,7 |
| Urban | 266,4 | 277 | 277,7 | 277,1 | 267,2 | 268,8 |
| Rural | 306,9 | 315,7 | 298,6 | 314,9 | 329,4 | 330,9 |
| Employed women, country's total | 570,1 | 580,9 | 570,5 | 580,7 | 588,3 | 603,9 |
| Urban | 272 | 279,8 | 276,3 | 273,4 | 270,8 | 286,5 |
| Rural | 298,1 | 301 | 294,3 | 307,3 | 317,5 | 317,4 |

Source: NBS

Annex 4.

Population aged 15 years and over by economic status, education level and sex in the Republic of Moldova the period 2010-2015

(per cent)

| | 2010 | | 2011 | | 2012 | | 2013 | | 2014 | | 2015 | |
|-------------------------|--------|--------|--------|--------|-------|--------|--------|--------|--------|--------|--------|--------|
| | M | W | M | W | M | W | M | W | M | W | M | W |
| Education level - total | | | | | | | | | | | | |
| Total | 1402,8 | 1565,8 | 1408,9 | 1566,3 | 1421 | 1561,7 | 1416,1 | 1570,9 | 1416,9 | 1571,6 | 1416,4 | 1570,9 |
| Active | 630,6 | 604,8 | 642,3 | 615,3 | 618,4 | 596,1 | 630 | 605,8 | 625,5 | 606,9 | 639 | 626,6 |
| Employed | 573,3 | 570,1 | 592,6 | 580,9 | 576,2 | 570,5 | 592,1 | 580,7 | 596,6 | 588,3 | 599,7 | 603,9 |
| ILO unemployed | 57,3 | 34,7 | 49,6 | 34,4 | 42,2 | 25,6 | 38 | 25,1 | 28,9 | 18,6 | 39,3 | 22,7 |
| Inactive | 772,2 | 961 | 766,6 | 951 | 802,5 | 965,6 | 786,1 | 965 | 791,4 | 964,7 | 777,4 | 944,3 |
| Higher | | | | | | | | | | | | |
| Total | 180 | 253,8 | 199,8 | 270 | 211,6 | 285,6 | 211,6 | 290,9 | 205,8 | 293,5 | 211,8 | 304,2 |
| Active | 126,4 | 154,7 | 134,9 | 161,3 | 141 | 171,3 | 145 | 167,7 | 135,2 | 165,2 | 136,6 | 172,4 |
| Employed | 117,3 | 145,5 | 126,1 | 152,2 | 131,7 | 163,9 | 136,9 | 160,9 | 128,9 | 159,8 | 128,1 | 165,9 |
| ILO unemployed | 9,1 | 9,2 | 8,8 | 9,1 | 9,4 | 7,4 | 8,1 | 6,7 | 6,3 | 5,4 | 8,4 | 6,5 |
| Inactive | 53,5 | 99,1 | 65 | 108,7 | 70,6 | 114,3 | 66,5 | 123,2 | 70,5 | 128,3 | 75,3 | 131,8 |
| Secondary specialized | | | | | | | | | | | | |
| Total | 138,4 | 230,5 | 144,2 | 238,5 | 146,3 | 239,9 | 143,7 | 227,9 | 141,4 | 223,1 | 137,5 | 235,5 |
| Active | 72 | 120,2 | 79,4 | 124,8 | 74,4 | 120,3 | 71,9 | 108,9 | 68 | 102,4 | 68,3 | 109,6 |
| Employed | 64,9 | 115,4 | 74 | 119,6 | 69,7 | 115,7 | 66,4 | 105,7 | 63,8 | 100 | 64,3 | 106,3 |
| ILO unemployed | 7,2 | 4,9 | 5,4 | 5,2 | 4,7 | 4,6 | 5,4 | 3,2 | 4,2 | 2,4 | 4 | 3,3 |
| Inactive | 66,3 | 110,3 | 64,8 | 113,7 | 71,9 | 119,5 | 71,8 | 119 | 73,5 | 120,7 | 69,2 | 126 |

| Secondary vocational | | | | | | | | | | | | | |
|----------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Total | 360,7 | 200,9 | 351,3 | 189,8 | 365,7 | 192,2 | 369 | 203,7 | 379,4 | 214,7 | 364,8 | 207,4 | 207,4 |
| Active | 198,6 | 101,3 | 197 | 94,5 | 186,8 | 88 | 184,5 | 90,4 | 193,6 | 95,6 | 185 | 96,6 | 96,6 |
| Employed | 183,2 | 94 | 181,6 | 88,9 | 174,9 | 84,1 | 174 | 86,4 | 186,3 | 93 | 174,5 | 93,6 | 93,6 |
| ILO unemployed | 15,4 | 7,4 | 15,4 | 5,6 | 12 | 3,9 | 10,4 | 4,1 | 7,3 | 2,6 | 10,5 | 3 | 3 |
| Inactive | 162,1 | 99,5 | 154,4 | 95,3 | 178,8 | 104,3 | 184,5 | 113,3 | 185,8 | 119,1 | 179,8 | 110,8 | 110,8 |
| Lyceum, upper secondary | | | | | | | | | | | | | |
| Total | 307,5 | 373 | 294,2 | 369,1 | 282,5 | 354,7 | 277,5 | 356,5 | 274,9 | 362,3 | 287,3 | 361,6 | 361,6 |
| Active | 123,8 | 135 | 117 | 135,6 | 109,9 | 122,2 | 108,3 | 129,9 | 105,4 | 132,2 | 116,7 | 132,6 | 132,6 |
| Employed | 110,1 | 126,7 | 106,6 | 126,6 | 100,9 | 116 | 102,3 | 123,2 | 99,5 | 127,9 | 110,5 | 128,6 | 128,6 |
| ILO unemployed | 13,7 | 8,3 | 10,4 | 9 | 9 | 6,2 | 6,1 | 6,7 | 5,9 | 4,4 | 6,2 | 4 | 4 |
| Inactive | 183,8 | 238 | 177,2 | 233,4 | 172,6 | 232,4 | 169,1 | 226,6 | 169,4 | 230,1 | 170,6 | 229 | 229 |
| Gymnasium, lower secondary | | | | | | | | | | | | | |
| Total | 335,1 | 379,2 | 344,7 | 376 | 345 | 380,6 | 349,7 | 392,8 | 356,4 | 391,2 | 357,5 | 383,8 | 383,8 |
| Active | 104,7 | 90,1 | 108,9 | 94,8 | 101,4 | 90,9 | 114,8 | 105,7 | 117,9 | 108,5 | 128 | 112,6 | 112,6 |
| Employed | 92,9 | 85,2 | 99,4 | 89,6 | 94,6 | 87,5 | 107,6 | 101,5 | 112,8 | 104,7 | 118 | 106,7 | 106,7 |
| ILO unemployed | 11,8 | 4,9 | 9,4 | 5,2 | 6,8 | 3,4 | 7,3 | 4,2 | 5,1 | 3,8 | 10 | 5,8 | 5,8 |
| Inactive | 230,4 | 289,1 | 235,8 | 281,2 | 243,5 | 289,7 | 234,9 | 287,1 | 238,5 | 282,7 | 229,5 | 271,3 | 271,3 |
| Primary or no education | | | | | | | | | | | | | |
| Total | 81,2 | 128,5 | 74,7 | 123 | 69,9 | 108,7 | 64,7 | 99,1 | 59,1 | 86,8 | 57,5 | 78,4 | 78,4 |
| Active | 5 | 3,5 | 5,1 | 4,3 | 4,8 | 3,3 | 5,5 | 3,2 | 5,4 | 2,9 | 4,4 | 2,9 | 2,9 |
| Employed | 4,9 | 3,3 | 4,9 | 4 | 4,5 | 3,3 | 4,9 | 3 | 5,3 | 2,9 | 4,2 | 2,8 | 2,8 |
| ILO unemployed | 0,1 | 0,1 | 0,3 | 0,2 | 0,4 | , | 0,7 | 0,2 | 0,1 | 0 | 0,2 | 0,1 | 0,1 |
| Inactive | 76,1 | 125 | 69,5 | 118,8 | 65,1 | 105,4 | 59,2 | 95,9 | 53,7 | 83,9 | 53,1 | 75,5 | 75,5 |

Source: NBS

Annex 5.

Average monthly disposable income per person, source of income and sex of household head in the Republic of Moldova in the period 2010-2014

| | Men | | Women | |
|---|---|-----------------------------|---|-----------------------------|
| | MDL, monthly average per per- son | Percen- tage of total | MDL, monthly average per per- son | Percen- tage of total |
| 2010 | | | | |
| Total disposable income | 1 259,60 | 100 | 1 303,50 | 100 |
| Employment | 567,9 | 45,1 | 488,6 | 37,5 |
| Self-employment in agricul- ture | 142,8 | 11,3 | 87,9 | 6,8 |
| Self-employment in non-agri- cultural sector | 100,9 | 8 | 55,4 | 4,3 |
| Property income | 1,4 | 0,1 | 2,5 | 0,2 |
| Social benefits | 212,7 | 16,9 | 290,9 | 22,3 |
| ..pensions | 168,4 | 13,4 | 242,6 | 18,6 |
| ..child benefits | 10,6 | 0,8 | 6,2 | 0,5 |
| ..compensations | 7,5 | 0,6 | 9,4 | 0,7 |
| ..social aid | 3,5 | 0,3 | 1,8 | 0,1 |
| Other income | 233,9 | 18,6 | 378,3 | 29 |
| ..remittances | 176,8 | 14 | 292,1 | 22,4 |
| 2011 | | | | |
| Total disposable income | 1 423,60 | 100 | 1 485,10 | 100 |
| Employment | 672,5 | 47,2 | 594,3 | 40 |
| Self-employment in agricul- ture | 166,1 | 11,7 | 102,3 | 6,9 |
| Self-employment in non-agri- cultural sector | 111,9 | 7,9 | 71,2 | 4,8 |
| Property income | 4,3 | 0,3 | 7,9 | 0,5 |
| Social benefits | 236,9 | 16,6 | 306,7 | 20,7 |
| ..pensions | 192 | 13,5 | 251,5 | 16,9 |
| ..child benefits | 10,1 | 0,7 | 11,3 | 0,8 |
| ..compensations | 8,1 | 0,6 | 8,8 | 0,6 |
| ..social aid | 2,6 | 0,2 | 3,3 | 0,2 |
| Other income | 231,9 | 16,3 | 402,7 | 27,1 |
| ..remittances | 175,6 | 12,3 | 307 | 20,7 |
| 2012 | | | | |
| Total disposable income | 1 471,70 | 100 | 1 580,00 | 100 |
| Employment | 670,3 | 45,5 | 593,9 | 37,6 |
| Self-employment in agriculture | 166,6 | 11,3 | 102,3 | 6,5 |

| | Men | | Women | |
|---|---|-----------------------------|---|-----------------------------|
| | MDL, monthly average per per- son | Percen- tage of total | MDL, monthly average per per- son | Percen- tage of total |
| 2012 | | | | |
| Property income | 1,4 | 0,1 | 5,7 | 0,4 |
| Social benefits | 268,7 | 18,3 | 329,8 | 20,9 |
| ..pensions | 220,2 | 15 | 276,7 | 17,5 |
| ..child benefits | 10,9 | 0,7 | 9,5 | 0,6 |
| ..compensations | 5,8 | 0,4 | 5,6 | 0,4 |
| ..social aid | 12,1 | 0,8 | 11,1 | 0,7 |
| Other income | 246,9 | 16,8 | 458,8 | 29 |
| ..remittances | 186,9 | 12,7 | 344,7 | 21,8 |
| 2013 | | | | |
| Total disposable income | 1 670,30 | 100 | 1 703,10 | 100 |
| Employment | 743,2 | 44,5 | 615,7 | 36,2 |
| Self-employment in agricultu- re | 176,4 | 10,6 | 106,5 | 6,3 |
| Self-employment in non-agri- cultural sector | 130,6 | 7,8 | 87 | 5,1 |
| Property income | 2,2 | 0,1 | 5,5 | 0,3 |
| Social benefits | 313 | 18,7 | 375,3 | 22 |
| ..pensions | 258,8 | 15,5 | 329,5 | 19,4 |
| ..child benefits | 15,9 | 1 | 7,7 | 0,5 |
| ..compensations | 0,2 | 0 | 0,2 | 0 |
| ..social aid | 8,6 | 0,5 | 11,1 | 0,7 |
| Other income | 304,8 | 18,3 | 513,1 | 30,1 |
| ..remittances | 240,6 | 14,4 | 389,8 | 22,9 |
| 2014 | | | | |
| Total disposable income | 1 772,80 | 100 | 1 757,30 | 100 |
| Employment | 781,7 | 44,1 | 644,6 | 36,7 |
| Self-employment in agricultu- re | 192,5 | 10,9 | 122,1 | 7 |
| Self-employment in non-agri- cultural sector | 145,9 | 8,2 | 59,7 | 3,4 |
| Property income | 1,5 | 0,1 | 2,5 | 0,1 |
| Social benefits | 328,8 | 18,5 | 414 | 23,6 |
| ..pensions | 281,5 | 15,9 | 366,6 | 20,9 |
| ..child benefits | 18 | 1 | 12,8 | 0,7 |
| ..compensations | - | - | - | - |
| ..social aid | 4,2 | 0,2 | 6,3 | 0,4 |
| Other income | 322,3 | 18,2 | 514,3 | 29,3 |
| ..remittances | 256,1 | 14,4 | 419,3 | 23,9 |

Source: NBS

Annex 6.

Population aged 25-64 years by age group, education level and sex in the Republic of Moldova in the period 2010-2014 (thousand persons,%)

| | 2010 | | 2011 | | 2012 | | 2013 | | 2014 | |
|--------------------|--------------|---------------|--------------|--------------|--------------|---------------|--------------|---------------|--------------|---------------|
| | M | W | M | W | M | W | M | W | M | W |
| Total | 929,3 | 1024,1 | 948,6 | 1038 | 971,4 | 1050,8 | 983,3 | 1073,7 | 990,9 | 1096,3 |
| Low | 167,5 | 198,3 | 179,0 | 204,5 | 189,0 | 209,0 | 203,9 | 227,4 | 212,7 | 230,5 |
| | 18,0 | 19,4 | 18,9 | 19,7 | 19,5 | 19,9 | 20,7 | 21,2 | 21,5 | 21,03 |
| Medium | 612,0 | 620,4 | 608,4 | 618,1 | 610,0 | 610,1 | 603,6 | 609,2 | 608,6 | 621,6 |
| | 65,9 | 60,6 | 64,1 | 59,5 | 62,8 | 58,1 | 61,4 | 56,7 | 61,4 | 56,70 |
| High | 149,8 | 205,4 | 161,3 | 215,5 | 172,4 | 231,7 | 175,8 | 237,1 | 169,5 | 244,2 |
| | 16,1 | 20,1 | 17,0 | 20,8 | 17,7 | 22,0 | 17,9 | 22,1 | 17,1 | 22,27 |
| 25-49 years | 644,7 | 675,5 | 651,2 | 676,3 | 665,3 | 674,6 | 670,9 | 686,2 | 671,3 | 702,7 |
| Low | 125,8 | 120,3 | 136,4 | 126,5 | 142,5 | 131,7 | 156,2 | 148,5 | 168,7 | 158,7 |
| | 19,5 | 17,8 | 20,9 | 18,7 | 21,4 | 19,5 | 23,3 | 21,6 | 25,1 | 22,6 |
| Medium | 410,2 | 404,8 | 397,4 | 390,8 | 393,9 | 372,5 | 382,6 | 359,8 | 376,3 | 362 |
| | 63,6 | 59,9 | 61,0 | 57,8 | 59,2 | 55,2 | 57,0 | 52,4 | 56,1 | 51,5 |
| High | 108,7 | 150,4 | 117,4 | 159,0 | 128,8 | 170,4 | 132,1 | 177,9 | 126,3 | 182 |
| | 16,9 | 22,3 | 18,0 | 23,5 | 19,4 | 25,3 | 19,7 | 25,9 | 18,8 | 25,9 |
| 50-64 years | 284,6 | 348,6 | 297,4 | 361,7 | 306,2 | 376,2 | 312,4 | 387,5 | 319,6 | 393,7 |
| Low | 41,7 | 78,0 | 42,5 | 78,0 | 46,5 | 77,3 | 47,7 | 78,9 | 44,1 | 71,8 |
| | 14,7 | 22,4 | 14,3 | 21,6 | 15,2 | 20,5 | 15,3 | 20,4 | 13,8 | 18,2 |
| Medium | 201,8 | 215,6 | 211,0 | 227,3 | 216,1 | 237,6 | 221,0 | 249,5 | 232,3 | 259,6 |
| | 70,9 | 61,8 | 70,9 | 62,8 | 70,6 | 63,2 | 70,7 | 64,4 | 72,7 | 65,9 |
| High | 41,1 | 55,0 | 43,9 | 56,5 | 43,6 | 61,2 | 43,7 | 59,1 | 43,2 | 62,2 |
| | 20,4 | 25,5 | 20,8 | 24,9 | 20,2 | 25,8 | 19,8 | 23,7 | 18,6 | 24,0 |

Source: NBS

Annex 7.

Employed population by length of the working week, economic activity, working time and sex in the Republic of Moldova in the period 2010-2015

(thousand persons)

| | 2010 | | 2011 | | 2012 | | 2013 | | 2014 | | 2015 | |
|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| | B | F | B | F | B | F | B | F | B | F | B | F |
| All economic activities | | | | | | | | | | | | |
| Total | 573,3 | 570,1 | 592,6 | 580,9 | 576,2 | 570,5 | 592,1 | 580,7 | 596,6 | 588,3 | 599,7 | 603,9 |
| Full-time | 531,5 | 532,4 | 549,2 | 539 | 529,6 | 524,4 | 550,9 | 537,8 | 564,9 | 547,8 | 566,4 | 563,3 |
| Part-time | 41,8 | 37,7 | 43,5 | 41,8 | 46,7 | 46,1 | 41,2 | 42,9 | 31,6 | 40,5 | 33,3 | 40,6 |
| Agriculture, hunting, fishery | | | | | | | | | | | | |
| Total | 175,1 | 139,6 | 182,8 | 140,2 | 170,9 | 132,4 | 190,3 | 147,6 | 204,3 | 156,8 | 216,9 | 165 |
| Full-time | 155,3 | 122,5 | 160,4 | 118,7 | 146,1 | 108,7 | 169,3 | 129,3 | 187,2 | 140 | 200,7 | 151,3 |
| Part-time | 19,8 | 17,1 | 22,4 | 21,6 | 24,8 | 23,8 | 21 | 18,2 | 17,1 | 16,8 | 16,1 | 13,7 |
| Industry | | | | | | | | | | | | |
| Total | 81,4 | 64,4 | 87,2 | 65,9 | 84,3 | 66,7 | 76,9 | 65,5 | 78,1 | 67,5 | 81,7 | 66,6 |
| Full-time | 79,2 | 61,5 | 84,1 | 63,5 | 81,4 | 65 | 74,7 | 63,5 | 76,8 | 65,9 | 80,7 | 64,9 |
| Part-time | 2,2 | 2,9 | 3,1 | 2,5 | 2,9 | 1,7 | 2,2 | 2 | 1,4 | 1,5 | 1 | 1,7 |
| Construction | | | | | | | | | | | | |
| Total | 61,5 | 6 | 61,3 | 5,6 | 64 | 6,2 | 59 | 6 | 60,6 | 5,8 | 60 | 5,3 |
| Full-time | 54,5 | 5,7 | 54,5 | 5,1 | 57,8 | 5,5 | 54 | 5,7 | 56,6 | 5,5 | 55,3 | 5,1 |
| Part-time | 7 | 0,3 | 6,8 | 0,5 | 6,2 | 0,6 | 5 | 0,4 | 4 | 0,3 | 4,8 | 0,3 |
| Wholesale and retail trade, hotels and restaurants | | | | | | | | | | | | |
| Total | 89,1 | 124,3 | 93,7 | 129,2 | 86,5 | 122,8 | 89 | 122,3 | 83,8 | 119 | 76,2 | 113,4 |
| Full-time | 85,1 | 119,4 | 89,8 | 124,9 | 82 | 117,5 | 84,7 | 115,5 | 81,1 | 114,3 | 72,9 | 107 |
| Part-time | 4 | 4,9 | 3,9 | 4,4 | 4,6 | 5,3 | 4,3 | 6,8 | 2,8 | 4,7 | 3,3 | 6,3 |
| Transport and communications | | | | | | | | | | | | |
| Total | 49,2 | 14,5 | 51,3 | 15,7 | 52,3 | 18,2 | 55,4 | 17,8 | 51,1 | 16,6 | 49,5 | 26,8 |
| Full-time | 45,7 | 13,8 | 49,1 | 14,3 | 49,3 | 16,5 | 53 | 16,6 | 49,6 | 15,5 | 47 | 23,4 |
| Part-time | 3,5 | 0,7 | 2,2 | 1,3 | 3 | 1,7 | 2,5 | 1,2 | 1,6 | 1,1 | 2,5 | 3,4 |
| Public administration, education, health and social assistance | | | | | | | | | | | | |
| Total | 78,4 | 172,3 | 76,3 | 173,8 | 75,1 | 172,1 | 70,1 | 165,5 | 65,9 | 165 | 68,6 | 167,2 |
| Full-time | 76 | 164,4 | 73,4 | 166,2 | 71,7 | 163,3 | 67 | 157,3 | 63,9 | 155,7 | 65,5 | 158,5 |
| Part-time | 2,4 | 7,9 | 2,9 | 7,7 | 3,4 | 8,8 | 3,1 | 8,3 | 2 | 9,3 | 3,1 | 8,7 |

| | 2010 | | 2011 | | 2012 | | 2013 | | 2014 | | 2015 | |
|------------------|------|------|------|------|------|------|------|------|------|------|------|------|
| | B | F | B | F | B | F | B | F | B | F | B | F |
| Other activities | | | | | | | | | | | | |
| Total | 38,5 | 49,1 | 39,9 | 50,4 | 43,2 | 52,3 | 51,2 | 56 | 52,7 | 57,6 | 46,8 | 59,6 |
| Full-time | 35,8 | 45,1 | 37,8 | 46,5 | 41,4 | 48 | 48,2 | 49,9 | 49,8 | 51 | 44,3 | 53,1 |
| Part-time | 2,8 | 3,9 | 2,2 | 3,9 | 1,8 | 4,3 | 3 | 6,1 | 2,9 | 6,6 | 2,5 | 6,4 |

Source: NBS

