

**WOMEN'S  
EQUALITY NOW:  
= GENDER  
RESPONSIVE  
BUDGETING**





# FOREWORD

WEN Wales aims to create a fairer society in which women and girls can live free from prejudice and gender discrimination and enjoy equality in all aspects of their daily lives.

We work to bring the voices of individuals and organisations to decision makers at national and international levels.

This research briefing is part of our ongoing 'Women's Equality Now: The Position in Wales Today' series. These publications highlight key issues for women and provide an opportunity for direct dialogue between women and decision makers in Wales.

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# INTRODUCTION

Gender-responsive budgeting (GRB) developed during the late 1990s following the Fourth World Conference on Women held in Beijing in 1994.

There it was agreed that, although there had been some significant progress world-wide in advancing the rights of women, inequalities still persisted.

GRB began as a critique of the traditional economic policies which had impacted negatively on working women.<sup>1</sup> Since then it has developed both as a tool for examining budgets and as a device for analysing policy from a gender perspective. The rationale for GRB is underpinned by various EU directives<sup>2</sup> and by the Vienna Declaration of Human Rights.<sup>3</sup>

In Wales, the Government of Wales Act<sup>4</sup> requires the government to demonstrate annually how it is promoting equality of opportunity.

## WHAT IS IT?

There is no single definition of gender-responsive budgeting: The concept has developed in diverse ways in different national contexts. Within a European framework it involves 'a gender-based assessment of budgets, incorporating a gender perspective at all levels of the

budgetary process as well as restructuring revenues and expenditures in order to promote gender equality'.<sup>5</sup> It is a process for analysing public expenditure and tax revenue with a view to deciding their part in promoting gender equality. The process involves asking key questions about annual budgets such as:

- Who benefits from state expenditure and how is the spending distributed between men and women?
- Is the spending meeting both women's and men's needs?
- What impact are budget decisions having on work, be it full-time, part-time, paid or unpaid?<sup>6,7</sup>

At its best such an exercise is not a one-off occurrence but a long-term means of holding governments to account for their gender equality policies. It can highlight any gaps which might occur between policy commitments and the resources allocated to achieve them. It can also reveal whether such strategies are having any effect on lessening the restrictive gender roles and norms that limit the lives of women and men.

GRB is a tool which contributes to **gender mainstreaming**.<sup>8</sup> This is a concept widely used by the UN, EU and similar bodies, and is defined by the European Commission as the 'integration of the gender perspective into every stage of policy'.<sup>9</sup>



# WHY DO WE NEED IT?

**Gender inequalities** exist in all societies, with women by and large having substantially less access to, and control over financial matters than men. In the UK women continue to earn less for doing similar work. Gender pay gaps have in fact increased over time.<sup>10</sup> In addition, women frequently do part-time work with less chance of career advancement than they would have in full-time occupations. They have also largely been responsible for the unpaid care of children and older people. The shift from state to market orientated approaches to the economy in recent years has seen a substantial increase in work in the unpaid sector, much of it undertaken by women.

**National budgets** are a way of addressing some of these inequalities. They are often considered to be gender neutral, but in fact they frequently fail to take into account the differing needs of women and men, and as such are discriminatory. Moreover, budgets are normally constructed within a traditional economic paradigm which fails to recognise the social implications of expenditure or that the paid economy is built on a foundation of unpaid care work.

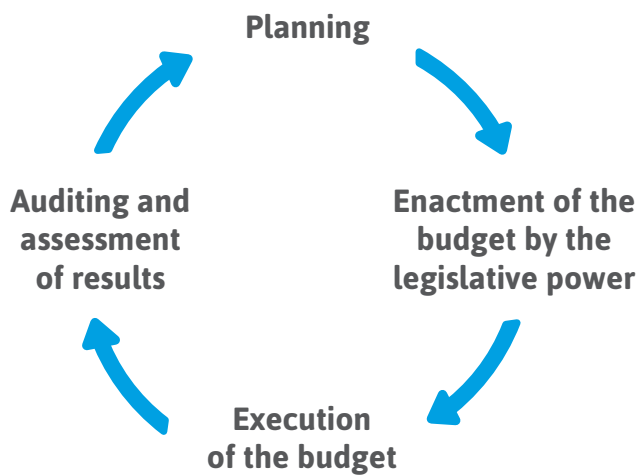
**Gender-responsive budgeting** can help to make governments aware of these issues. Administrations need to know how they are spending their money. Expenditure needs diligent scrutiny in order to determine its impact on both women and men, but also how it is addressing the other priorities of poverty and ethnicity. It can help governments recognise and take into account not only women's contributions to the market economy, but also their unpaid care work.





# HOW IS IT DONE?

There is no model which fits all situations, but a number of factors need to be taken into consideration. Central to these is the budget process itself. NCPE<sup>11</sup> has noted that there are four main phases to this:



It is important that reflection on gender issues occurs at every stage of the process. However, for those seeking measurable change, the key to success is intervention in the first two phases. Phases three and four are the points where the success or failure of policy objectives can be judged.

In order to make gender effects visible, the relevant statistics need to be made available. There then needs to be detailed analysis of the public finances in terms of who contributes, who benefits and what the measurable outcomes are.

At all stages consideration has to be given as to whether gender-related differences have been adequately taken into account. However, it is often the case that data disaggregated by gender is difficult to obtain and this lack of data may be used as an excuse not to take gendered considerations into account. Where statistics are not available, it is important that efforts are made to begin to collect this data.

To ensure that gender-related differences are taken into account, civil society in the form of women's groups and other related organisations, need to be actively involved in the consultation and research process. To facilitate this, government departments need to provide 'the full disclosure of all relevant fiscal information in a timely and systematic manner'<sup>12</sup>. This is a complicated process with many interlocking strands. It has to be viewed as a long-term project in which change will occur, albeit slowly.<sup>13</sup>



# WHAT ARE THE BENEFITS?

Primarily GRB is a way of ensuring that gender-related goals in public policy are put into effect. It can produce greater budget transparency and accountability. In highlighting any gaps between policy statements and resources, GRB helps to ensure that money is spent in a more equitable way so that objectives are more likely to be achieved. It is also a tool which can test government mainstreaming commitments linking policy across departments. Research suggests that where budgets become more gender equal there are benefits for all groups: Gender, ethnicity and class.<sup>14</sup>

## Government is likely to achieve:

- Increased awareness of gender issues
- Clearer ways of achieving gender-related targets
- Expenditure directed to those in most need
- Better monitoring with clearer understanding of who is receiving the services
- Elected representatives who are better informed and equipped to adopt a gender perspective
- A stronger electoral mandate based on greater transparency, accountability and participation

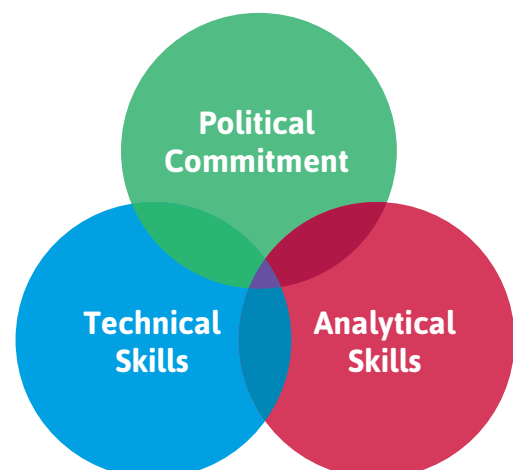
## Society is likely to benefit from:

- Greater expenditure on children and domestic essentials
- More investment in education for women and girls
- An increase in women's employment overall and women in better-paid jobs
- More women in power leading to re-distribution of budget income

There are strong indications that countries which have increased women's opportunities for employment, education and health care, have a faster pace of economic development.<sup>15</sup> Stronger links between governments and civil society are likely to increase democratic accountability.

## What factors are likely to lead to its success?

Sharp and Broomhill<sup>16</sup> have demonstrated that for gender responsive budgets to be effective there needs to be a balance between three dimensions:





# CONCLUSION

**Political commitment** to gender equality is of paramount importance and needs to come from the highest level of government. There has to be a strong political will to prioritise gender issues and to allocate appropriate resources. This process is helped if there is a high level of female participation. The government needs to be clear that it is complying with and implementing international protocols such as the UN Sustainable Development Goals and the UN Convention on the Elimination of Discrimination Against Women (CEDAW).

**Technical skills** require people with the right competencies, including the ability to gather and collate disaggregated statistics. Staff assigned to the roles need to be neither too high nor too low in the organisational structure. The former often have insufficient time to give to the task, and the deliberations of the latter may well be overlooked.

**Analytical skills** involve the rigorous gender analysis of budgets. This process should include a gender cost-benefit analysis pre-budget and an assessment of the impact of the proposals post-budget. It demands good internal monitoring but also close scrutiny by those women's organisations able to report on persistent gender omissions and funding gaps. Fundamental to success is the engagement of women from ordinary backgrounds who can bring accounts of everyday experiences to the discussion. To facilitate all of the above, there needs to be the training and awareness-raising of all participants, both governmental and external.<sup>17</sup>

Gender-responsive budgeting is a means of tackling gender inequality. Successful strategies have yielded results, but this varies from country to country. It is unlikely to be very effective unless the relevant government is itself committed to such priorities. For example, it has been successful in Sweden where the gender policy objectives are the statutory responsibility of central government and are pursued with vigour.<sup>18</sup>

GRB can be used as a tool for change, but it needs to be employed in conjunction with other policies across departments and must affect the whole economic strategy. Introducing a gender perspective is likely to require radical changes to both institutions and to traditional ways of doing things.<sup>19</sup> Direction and leadership must come from central government with the active participation of women's organisations and other elements of civil society.

## Further reading

UN Women, Gender Responsive Budgeting  
[www.gender-budgets.org](http://www.gender-budgets.org)

Women's Budget Group (UK)  
[www.wbg.org.uk](http://www.wbg.org.uk)



# WHAT NEXT?



**What are the key areas of the budget where you think we need to apply a gender budgeting approach?**



**What data do we need to collect and analyse to ensure resources are being allocated fairly between men and women?**



**Are there areas of budget allocation where you think gender is not currently being considered?**



**Who needs to be trained in Gender Responsive Budgeting to ensure the approach will be effective in Wales?**

<sup>1</sup> Gender Toolbox (2007) What is gender budgeting? <http://www.fit-for-gender.org>

<sup>2</sup> European Parliament (2003) Report on Gender Budgeting- Building public budgets from a gender perspective, Doc: A5-0214/2003.

<sup>3</sup> Vienna Declaration of Human Rights [http://www.unchr.ch/huridocdahttp://www.legislation.gov.uk/ukpga/1998/38/contentsda/huridocda.nsf/\(Symbol\)/A.CONF.157.23.En](http://www.unchr.ch/huridocdahttp://www.legislation.gov.uk/ukpga/1998/38/contentsda/huridocda.nsf/(Symbol)/A.CONF.157.23.En)

<sup>4</sup> Government of Wales Act (1998) <http://www.legislation.gov.uk/ukpga/1998/38/contents>

<sup>5</sup> European Parliament Resolution on Gender Budgeting (P5\_TA(2003)02323).

<sup>6</sup> Rake, K. (2002) "Gender Budgets: The Experience of UK's Women's Budget Group" London: London School of Economics and Women's Budget Group, Basel: Gender Balance – Equal Finance.

<sup>7</sup> Baumgardt, A. (2015) Gender Budget Workshop, WEN Wales.

<sup>8</sup> Daly, M. (2005) Gender Mainstreaming in Theory and Practice Social Politics: International Studies in Gender, State and Society Volume 12, Number 3, 2005 pp. 433-450

<sup>9</sup> European Commission: Tools for Gender Equality [http://ec.europa.eu/justice/gender-equality/tools/index\\_en.htm](http://ec.europa.eu/justice/gender-equality/tools/index_en.htm)

<sup>10</sup> National Commission for the Promotion of Equality (2009) Gender Responsive Budgeting. A study of GRB initiatives in Sweden, Switzerland, Italy, United Kingdom and France Malta: NCPE This publication is supported by the European Community Programme for Employment and Social Solidarity – PROGRESS (2007-2013). The Decision no 1672/2006.

<sup>11</sup> Ibid.

<sup>12</sup> Ibid.

<sup>13</sup> UNIFEM (2009) Evaluation report on gender responsive budgeting programme.

[http://www.unwomen.org/-/media/Headquarters/Media/Publications/UNIFEM/Evaluation\\_GRB\\_Programmeen.pdf](http://www.unwomen.org/-/media/Headquarters/Media/Publications/UNIFEM/Evaluation_GRB_Programmeen.pdf)

<sup>14</sup> Combaz, E. (2013), Positive Impact of Gender- Responsive Budgeting (GSDRC Helpdesk Research Report 977). Birmingham, UK: GSDRC, University of Birmingham.

<sup>15</sup> Klasen, S. (2006) : Poverty, under-nutrition, and child mortality: some inter-regional puzzles and their implications for research and policy, IZA Discussion Papers, No. 2509, <http://nbn-resolving.de/urn:nbn:de:101:1-2008050612>

<sup>16</sup> Sharp R and Broomhill R (2013) A Case Study of Gender Responsive Budgeting in Australia. Printed and published by the Commonwealth Secretariat

<sup>17</sup> National Commission for the Promotion of Equality (2009)

<sup>18</sup> Ibid.

<sup>19</sup> Budlender, D (2005) Expectations versus Realities in Gender-Responsive Budget Initiatives. Cape Town: UNRISD Available at: [http://www.unrisd.org/80256B3C005BCCF9/\(httpAuxPages\)/0D98E65D9D93D4AC1257013005440D1/\\$file/dbudlende.pdf](http://www.unrisd.org/80256B3C005BCCF9/(httpAuxPages)/0D98E65D9D93D4AC1257013005440D1/$file/dbudlende.pdf)