

Gender Budgeting: a powerful approach for gender mainstreaming

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**Fondazione
Giacomo Brodolini**

Summary

- Introduction and presentations
- Definitions
- Methods, approaches, examples
- The Genislab case
- Exercise...let's try to put it in practice

FGB Description

The **Fondazione Giacomo Brodolini** is an Italian research centre established in 1971 in order to carry on the social and cultural work started by the former minister of Labour Giacomo Brodolini, who was responsible for the Workers' Statute.

The activities of the FGB are mainly focused on the following issues:

- economy, sociology and labour law;
- equal opportunities;
- training policies;
- local development;
- industrial relations.

www.fondazionebrodolini.it
www.ingenerere.it/en

FGB activities in the field of Gender Equality

The FGB started promoting policies on gender equality strongly convinced that the increased participation of women in the labour market is not just a matter of equal opportunities but is a driver for a sustainable growth

In 15 years FGB took part as a promoter, scientific coordinator or partner in more than 50 EC funded projects on gender equality, involving public and private partners in most EU countries.

Since 2009 FGB is editor of the web magazine ingenero.it

Since 2012 FGB promotes the Master in Gender Equality and Diversity management www.fgblearning.it

FGB Gender budgeting experience

In the last 5 years FGB has coordinated several projects aiming at implementing the gender budgeting analysis as a tool to mainstream gender within Public Bodies at local level:
Catanzaro Province, Marche Region, Lazio Region, and recently Pistoia Province.

FGB has been coordinating the project “**GENISLAB**” cofounded by DG RD whose aim is to implement structural changes within 6 European organisations performing scientific research in order to overcome the factors that limit the participation of women in science. Gender budgeting is one of the approaches that has been used to reach the objective.

GB, Definitions

‘Gender-sensitive budgets’, ‘gender budgets’, ‘women’s budgets’ and ‘women’s budget statements’

refer to a variety of processes and tools aimed at *facilitating an assessment of the gendered impacts of government budgets.*

These budget exercises use **gender** as a category of analysis.

‘Gender-sensitive budgets’ are not separate budgets for women, or for men. They are attempts to break down, or disaggregate, the government’s mainstream budget according to its impact on women and men, and different groups of women and men, with cognizance being given to the society’s underpinning gender relations.

Rhonda Sharp (1999 forthcoming), ‘Women’s budgets’, in Meg Lewis and Janice Peterson (editors), Dictionary of Feminist Economics, New York: Edward Elgar.

Gender Blindness

A budget appears to be a gender-neutral policy instrument.

It is set out in terms of financial aggregates - totals, and sub-totals of expenditure and revenue, and the resulting budget surplus or deficit.

As usually presented, there is no particular mention of women, but no particular mention of men either.

However, this appearance of gender-neutrality is more accurately described as gender-blindness.

Gender Blindness

The way in which the national budget is usually formulated **ignores the different, socially determined roles, responsibilities and capabilities of men and women.**

These differences are generally structured in such a way as to leave women in an **unequal position** in relation to the men in their community, **with less economic, social and political power.**

Until now the **average citizen targeted** has been belonging to the ethnic majority (in EU, white), male, healthy, middle aged, middle class

Gender Budgeting

Financial choices reflect the dominant culture and its related **power relationships**, because power is created through the concentration of resources.

When addressing gender equality, then, it is important to understand and monitor how **resources are distributed** and what effects each assignment has on each gender.

Gender Budgeting

DEFINITION: Gender budgeting introduces a “gender equality perspective into the budgetary process to ensure an efficient allocation of resources based on identified needs, and to restructure revenues and expenditures to strengthen gender equality and women’s empowerment” (OECD 2010).

Gender budgeting is a **complementary tool to gender mainstreaming** (Villagomez 2004) and represents a tool with **considerable potential** for the promotion of necessary structural changes, enabling a reduction in discrimination within scientific organizations too. However, its application in such organizations is still very limited (Rothe et al. 2008).

GB and Gender Mainstreaming

Gender Budgets are fundamentally **about mainstreaming gender issues – about ensuring that gender issues are integrated into all national policies, plans and programs** rather than regarding women as a special ‘interest group’.

The objective of a gender-sensitive budget is to inform debate about policy and the appropriate allocation of public expenditure and taxation.

Gender Budgeting

- ✓ It started as an exercises on public organisations, at national level.
- ✓ It was implemented at regional level (the Italian case)
- ✓ It can be useful to analyse from a gender perspective the allocation of ressources in organisations (the Genis Lab case)

Why Gender Budgeting?

The **impact** and the **effects** of policy measures **differ significantly on men and women** and such result needs to be taken into account when **designing, programming and adopting the different policy options.**

Therefore, public stakeholders have to deal with gender issues and bear in mind that men and women play different roles in the society and the economic structure.

Why Gender Budgeting?

By using a **bottom-up approach**, gender budgeting initiatives promote the principle of equal opportunities on the labour market and raise the awareness of all the stakeholders (*local administrators, professionals, civil society*).

The knowledge of institutions and civil society must be enhanced by providing information on the **potential gender implications of a programme**, policy or intervention and developing concrete actions to further support the adoption of innovative gender approaches.

Which benefits from GB?

GB is not a separate budget but it is simply a different point of view on Public administration budgets. It is a democratic exercise **for transparency** in public budget management.

It is an **evaluation activity** that integrates the gender perspective at all levels of the budget procedure in order to achieve:

- Equity
- Efficiency
- Transparency
- Awareness

Accountability

Which benefits from GB?

GB increases budgets transparency ensuring that policy measures **effectively address the objective of women's well-being.**

Possible results include:

- enhancement of the ability of Public Institutions in addressing issues from a gender perspective.
- improvement of the ability of Public Institutions in incorporating the gender perspective into the whole policy making process, in order to achieve a fairer and gender sensitive allocation of funds
- building/reinforce gender competences

GB process – the activities

- **Awareness campaigns** (seminars, workshops, good practice *live* presentations, media relations, dissemination toolkit, National Conference) to promote gender/equal opportunities approach among policy makers, administrators, social partners and all actors involved in employment policies and governance
- Exchange of **good practices** in order to share experiences and innovative solutions adopted to address gender-related problems (website, paper-based collection)

GB activities

- Organisation of **training sessions** at local level to disseminate the gender budgeting principles, concepts, tools and methodologies to local administrators, professionals, civil society and support their adoption.
- Launch of **pilot actions** involving specific *units* in order to apply the gender budgeting principles to specific policy programmes and foster the institutional implementing capacity
 - *performing a gender sensitive context analysis*
 - *acquiring gender disaggregated data*
 - *applying gender codes to balance sheets*
- Building up a **network of stakeholders** dealing with gender budgeting at national and EU level

Gender Budgeting

Several countries have already produced gender-sensitive budgets and others are in the process of doing so.

Strengthening the gender perspective of public interventions is essential to foster a well-balanced development and provide opportunities to women and men in their life.

In each country the exercise differs according to the local situation. Some of the differences between the models can be categorised according to the following criteria:

Location

Who initiates the exercise?

Who does the exercise?

Participants in these exercises can include government, parliamentarians, non-governmental organisations (NGOs) and others in civil society.

If the exercise is conducted within government, there are further questions as to who actually does the day to day work and how the chain of responsibility will function.

In practice, this may involve the women's ministry or other government gender machinery, the finance department, or other staff within individual portfolios and contracted consultants.

Scope

What is covered in the exercise?

Will it be all levels of government (national, state/provincial and local)?

Will it cover both expenditure and revenue?

In the case of expenditure, will it cover all or only selected portfolios?

If it covers selected portfolios, will it be only the social sectors, or will it include a balance of social and economic portfolios?

If an analysis of revenue is part of the exercise, will it cover only taxation or all sources of revenue?

Which figures will be examined - past budget, past actual expenditure, estimated current budget allocations, future budgets as projected in medium-term expenditure frameworks?

Reporting format

Will it be published as a separate budget document or integrated in existing public documents?

The choice depends to some extent on the existing budget documents in a country.

And now a video

<https://vimeo.com/77692813>

#gendermainstreaming

#GRB (Gender Responsive Budget)

#efficiency

#snow



Gender in science
and
technology
Lab

Genislab project

Genislab: 7FP RD programme project

aims to implement structural changes in a group of selected scientific organizations in order to overcome the factors that limit the participation of women in research.

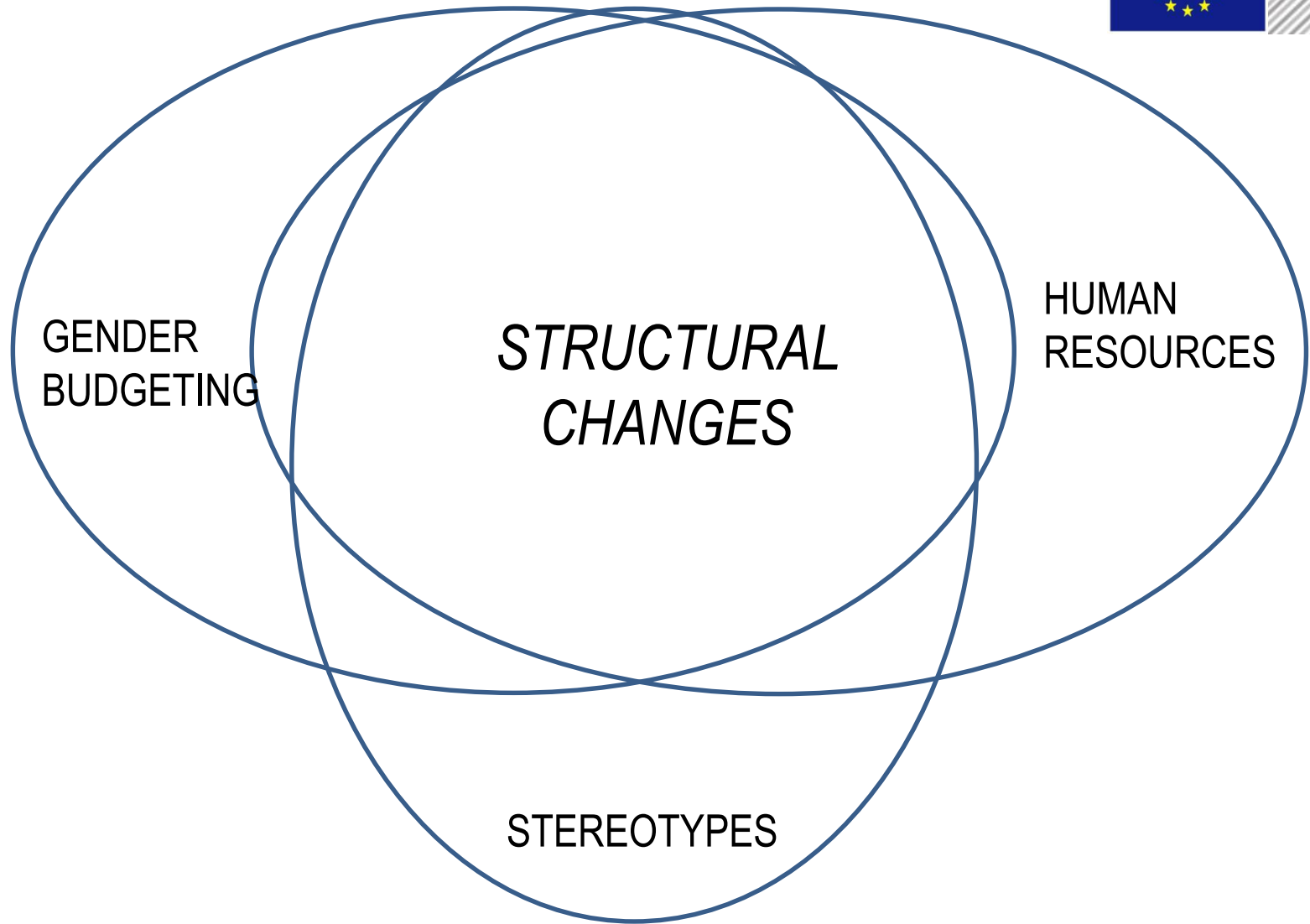
Fondazione Giacomo Brodolini is coordinating the project + in charge of introducing GB in scientific organisations.

2010-2014



GENIS LAB Consortium

PARTNER	COUNTRY	ROLE
Fondazione Giacomo Brodolini (FGB)	IT	Coordinator Technical partner
Associazione Donne e Scienza (ADS)	IT	Technical partner
International Training Centre/International Labour Organization (ITC/ILO)	IT	Technical partner
Istituto Nazionale di Fisica Nucleare (INFN)	IT	Scientific partner
Blekinge Institute of Technology (BTH)	SE	Scientific partner
Faculty of Technology and Metallurgy, University of Belgrade (FTM UB)	RS	Scientific partner
National Institute of Chemistry (NIC)	SI	Scientific partner
Leibniz-Institut für Polymerforschung Dresden e.V. (IPF)	DE	Scientific partner
Consejo Superior de Investigaciones Científicas (CSIC)	ES	Scientific partner



The Genis Lab example

Preliminary results of implementation of gender budgeting in two out of the six scientific organisations that are research centres of excellence in Italy, **Spain**, Germany, Slovenia, **Sweden** and Serbia in the areas of sciences, technology physics and information technology.

Methodological challenges

in implementing gender budgeting in scientific organisations

GENDER BUDGETING PROCESS

PHASE 1: Analyse GENDER BUDGET ANALYSIS

1. Analysis of the organisations:
 - context
 - human resources
2. Analysis of policy and services for gender equality in the organisation:
 - Mapping and auditing of policy and services (activities)
 - Assessment of adequacy of budget allocations (inputs) to implement gender-responsive policies
 - Assessment of short-term outputs of expenditure, in order to evaluate how resources are actually spent, and policies and programmes implemented
 - Assessment of the long-term outcomes or impact expenditures might have
3. Analysis of resources allocation (funds, time, space)

ACTIONS

- a) Collect and publish sex disaggregated data
- b) Awarenessraising
- c) Institutions for promoting gender equality
- d) Gender-fair participation at all stages of the budgeting process
- e) Transparency of the budgeting process
- f) Integration of gender analyses and aspects into all accounting systems
- g) System of financial incentives
- h) Implementation of gender sensitive measures for a modified personnel recruiting
- i) Including the gender dimension in any system of quality accreditation

PHASE 2: Change GENDER BUDGET PROGRAMMING

1. Deduction and formulation of gender sensitive objectives and indicators
2. Development of strategies: programmes and design of instruments and measures
3. Gender impact assessment
4. Allocation of money
5. Implementation of instruments and measures, projects or programmes
6. Monitoring and gender controlling
7. Analysis of initial situation in a gender differentiated way

Results: gender equality in research national data



GENDER INDICATORS	Sweden	Spain	Eu15	EU27
Proportion of women on boards, 2010	49	34	37	36
Proportion of female researchers by sector, 2009, Government Sector	39	48	39	40
Proportion of female researchers by sector, 2009 Higher Education	44	40	40	40
Proportion of female researchers by sector, 2009 Business Enterprise sectors	26	29	19	19
Proportion of female PhD (ISCED 6) graduates, 2010	48	47	45	46
Annual growth rates of female researchers in the Higher Education Sec.2002-2009	-5.1	6.1		
Compound annual growth rates of female researchers in the Govern. Sec. 2002-2009	-33	20		
Dissimilarity index* for researchers in Higher Education Sector (HES) 2009	0.19	0.03		
Dissimilarity index* for researchers in Government Sector (GOV), 2009	0.29	0.09		

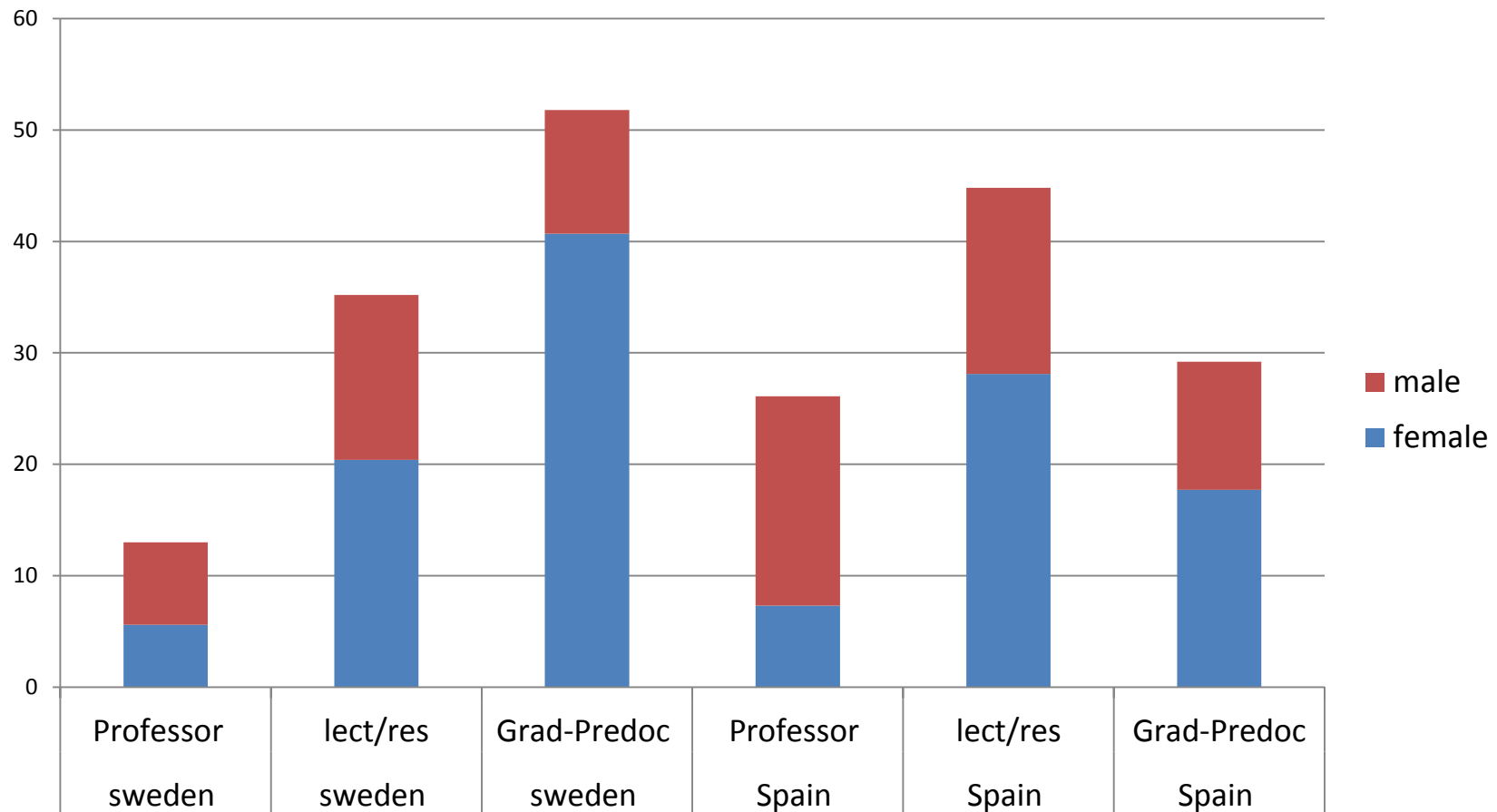
Results: gender equality in research national data



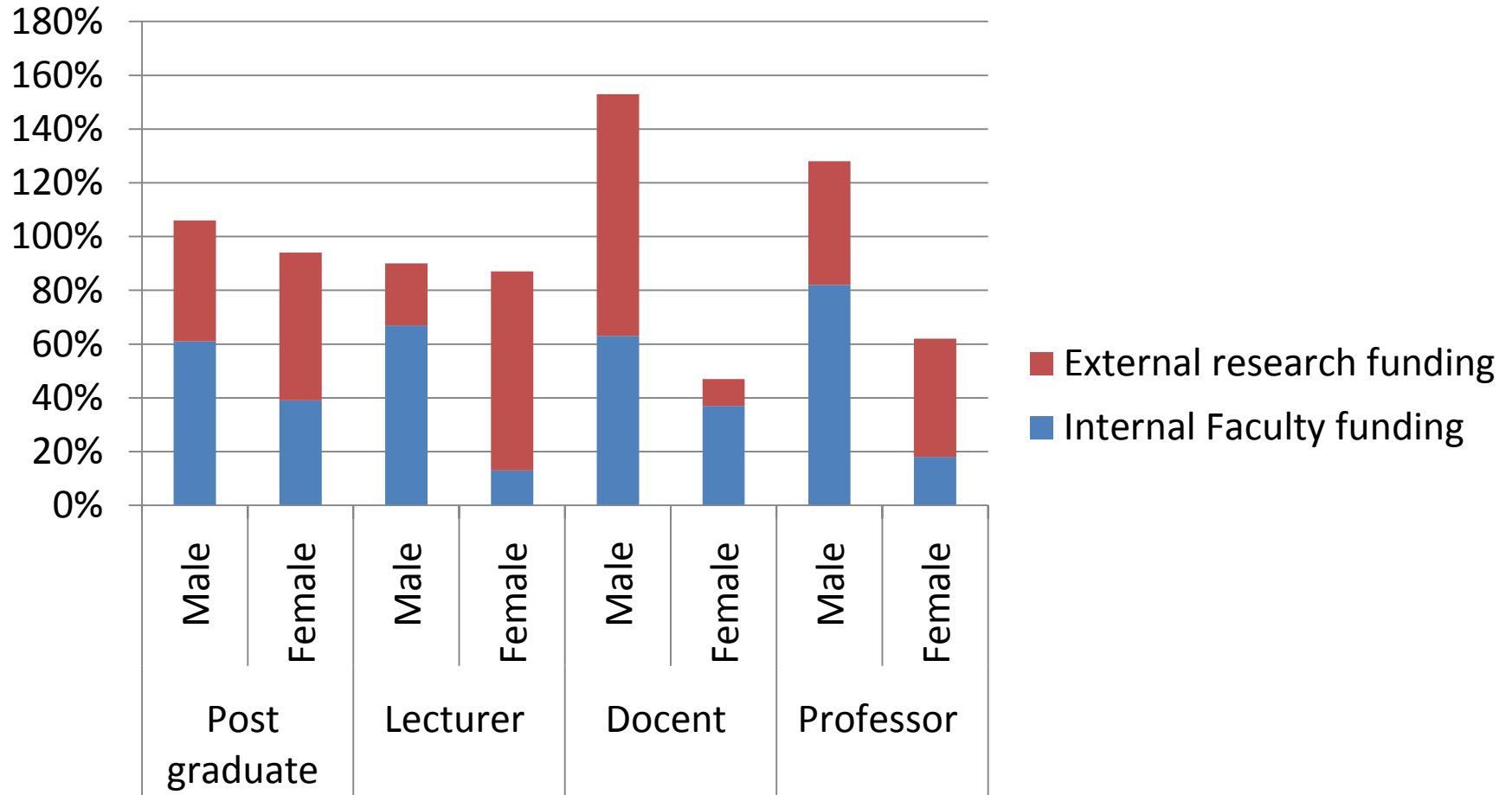
GENDER INDICATORS	Sweden	Spain	Eu15	EU27
Proportion of female academic staff by grade and total, 2010 grade A	20	17	18	20
Proportion of female academic staff by grade and total, 2010 grade B	48	38	36	37
Proportion of female academic staff by grade and total, 2010 grade C	43	49	43	44
Proportion of female academic staff by grade and total, 2010 grade D	50	52	45	46
Proportion of female grade A staff in Engineering and technology 2010	10.1	7.9		7.9



Results: % male – female human resources in organisations



Results: Sweden funds allocation



Results: Funds allocation in Genislab organisations



Female researchers activities depend more on sources of **external funding**, especially for post graduate and lecturer grades.

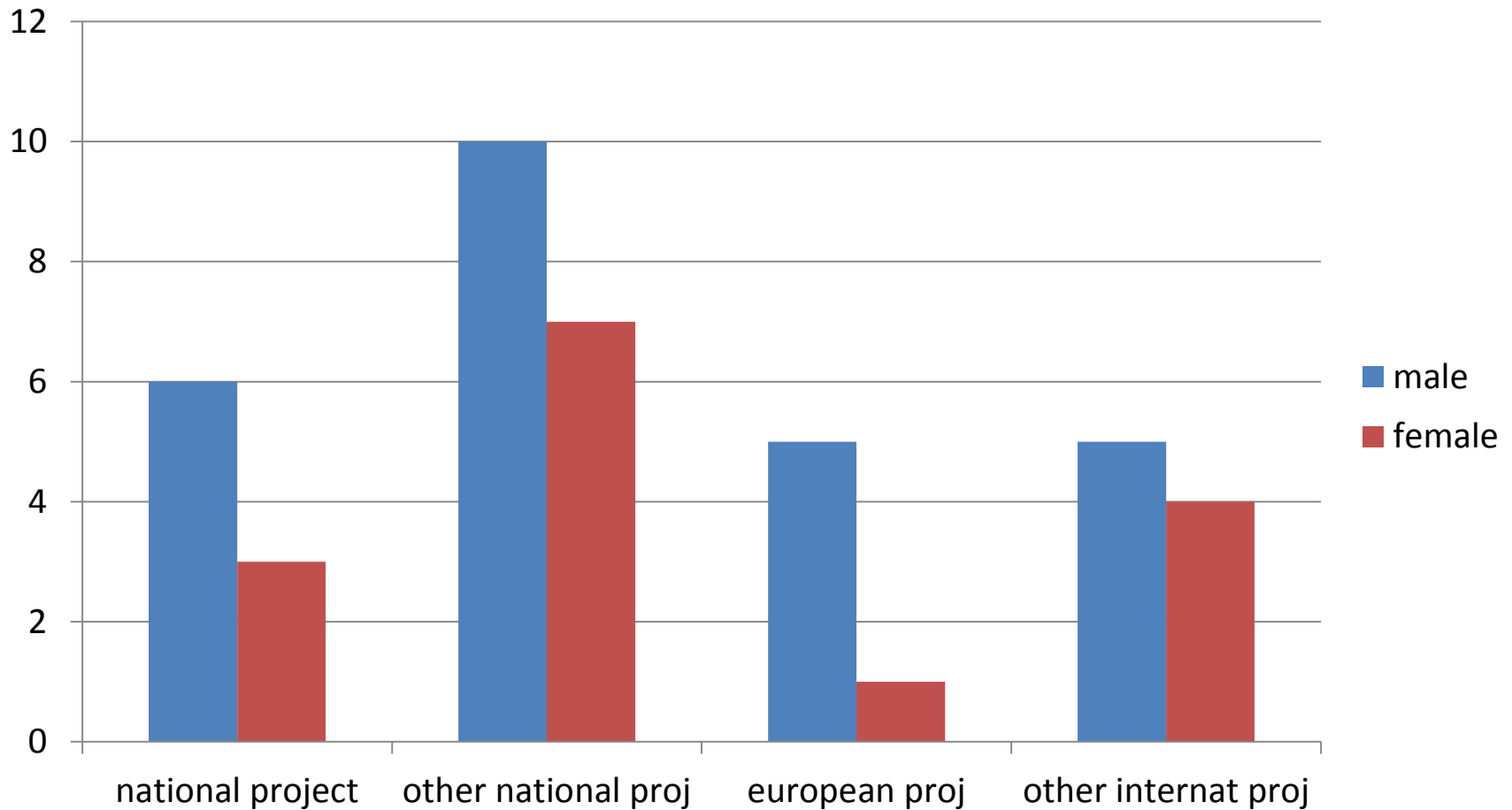
The results confirm **misallocation** of resources being of such an extent that there is no equal opportunity for men and women in doing research or of career development.

Moreover the review of research strategies and interviews with heads of schools confirms the **lack of gender perspectives**.

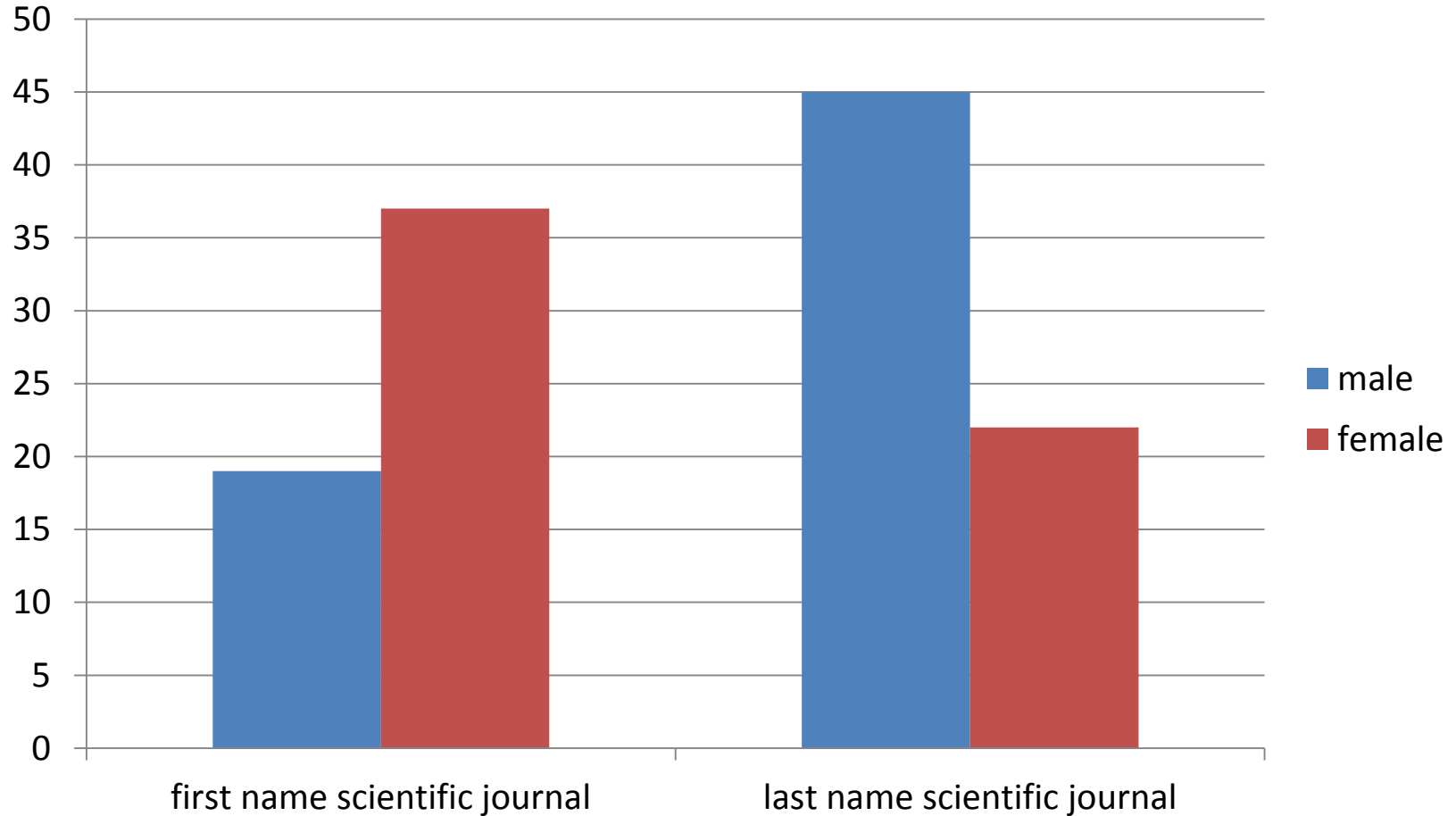
No schools was able to present a current strategy or a commitment to equalizing resources between the sexes.

However, most of the deans were open to such work.

Results: Spain funds allocation project leaders (2012)



Results: Spain outputs indicators by gender (2012)



Results: gender differences in time allocation in Sweden

the distribution of working hours differs between men and women, as men devoted more time for research than women.

Female lecturers and research assistant spend less time on research and more time on other tasks compared to men.

(survey involving 51 academic staff in the Swedish organisation taking part in the project- similarity with Swedish Agency for Higher Education in 2007)

Results: gender differences in time allocation in Sweden

- Higher is the number of women experiencing that time allocated to research is not satisfactory, while lower is the number of women feeling that they could influence their planning.
- One female researcher states that '*the time is too fragmented to do serious research, the research is done during the summer break and long weekends*'.

Results: gender differences in time allocation in Sweden

Moreover data collected through semi-structured in depth interviews to two female and two male lecturers highlight that **women tend to work more than 40 hours per week and do not get extra compensation for this, while male interviewees highlights that they do not do overtime that is not paid.**

Result: space in Spain and Sweden

- Comparative analysis show that in the organisations taking part in the project in Spain and in Sweden there is **no evident gender differences in space allocation**.
- Male and female academic staff has the same square meter, a part from two male researcher in Sweden who have access to extra rooms due to their research activities.
- There are no data on **space requests** and related answers, therefore it is unclear if any women at the department had asked for more special resources for similar needs.

Result: space in Spain and Sweden

- Nevertheless, data analysis points out that in both organisations the majority of staff members have offices next to another persons of the same sex as themselves. Therefore **women sit side by side with women, men sit with men**
- Moreover in Swedish organization analysis brought to the light that men tends to have rooms with the worst view but in proximity of other **office resources** such as staff rooms, copying room and nearness to other colleagues.

Challenges

- 1) The introduction of gender budgeting has faced many **resistances** in the organizations and the theoretical background as well as the implementation strategies have been largely discussed within each scientific organization with heads of departments, administrative officers and researchers.

Challenges

- 2) Gender budgeting analysis shows a persistent **gender unbalance** with regard to three main typologies of resources:
- funds (Rothe et al. , 2008)
 - space (Massachusetts Institute of Technology, 1999)
 - time (Winslow, 2010).

Challenges, funds

- Analysis has highlighted **gender inequalities in allocation of funds**, in both organizations.
- Sweden female researchers rely more on external funds, and have access to less than 30% of the faculty funds, despite the gender balance that characterised the staff of the school taking part in the pilot phase.
- Women face barriers in accessing funds in both organisations (Whittington 2011).

Challenges, space

- Sex disaggregated analysis of **space** does not show relevant gender differences, nevertheless some data needs to be considered and would **require a more in depth analysis** such as the preference shown by men and women both in Sweden and in Spain for rooms closer to colleagues of the same sex, and the preferences for male researchers in Sweden to choose room with easier access to other resources room, such as copy machine and staff room.

Challenges, time

- Data collection on time allocation need to be completed for Spain, nevertheless the qualitative data collected in Sweden point out that women and men have a different attitude towards **time managing and overtime**

Challenges

3) Inequalities in funds allocation represent a key data to promote structural changes in the organisations. The main strength merit of gender budgeting implementation is the opportunity to scientifically collect data on allocation of resources within the organisations and introduce more transparency in budgeting process.

By framing gender issues in terms of economic discourse, gender budgeting liberates gender, and gender mainstreaming (Petra Meier and Karen Celis 2011) from the arena of soft social issues, and raises it to the level of economics, which is often thought of as being technical, value-free and gender-neutral (Maria Cristina Marcuzzo and Annalisa Rosselli 2008).

Challenges

4) In all of the organizations taking part in the project, the issue was not the lack of a legal framework for equal-opportunity rights, but real accessibility to such rights.

Gender budgeting is an innovative tool with which to develop practical strategies and promote actions that support the structural changes required to narrow the gap between formal and substantial equality in scientific organizations.

Challenges

5) Gender budgeting first step (analysis) has been implemented, it is now time to plan changes and **quota in resources allocation** could be an interesting option to consider.

Exercise

- How could you apply GB in your organisations?
- Which dimensions would it be a priority to investigate?
- Which stakeholders would you need to include in the project?

Grazie!!

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