

## 2.2 Summary of discussions

### 2.2.1 PANEL I – EXCHANGE OF EXPERIENCE

- **What is the experience with Gender Budgeting analysis?**
- **Where do we stand?**
- **What is its success, what are limitations encountered?**

As an introduction to this session **Mascha Madörin** (Switzerland) pointed out that Gender Budgeting is a compliance and new diligence question. There is a big difference between inside and outside government activities. These differences refer to

- methods,
- questions as well as
- statistics and data.

The reporting will appear very different whether it is an inside or outside government exercise. Inside government Gender Budgeting (as well as Gender Mainstreaming) is a technique of compliance. Mascha Madörin underlined that initiatives outside government have to have a clear idea of what the state has to do and these initiatives have to tell the state what to do. At the core of these exercises are incidence analysis and equal opportunity analysis.

The standards developed in Switzerland focus on three elements:

- Who profits from public services?
- Impact of budgets on non-paid work.
- Impact on jobs (looking at procurement policies, consulting, subsidies etc).

Mascha Madörin pointed out that looking at subsidies is a very important element as well. It implies looking at who gets the money, which is a question of power and control of the state.

**Elizabeth Villagomez** (Spain) provided some introductory remarks as well and stated that Gender Budgeting initiatives are very heterogenous. Challenges for government driven activities are how to involve outside government actors. Evaluations and research on Gender Budgeting shows that those most successful are approaches which involve both, civil society activities (as a pushing factor) as well as government activities. There is a need to sensitize governments. Gender Budgeting is an issue of governance, transparency and intensifying democratisation. Outside government initiatives need to focus on how Gender Budgeting initiatives can have an influence on changing policies.

In the general discussion among experts from throughout Europe Gender Budgeting initiatives were presented and analysed focussing on lessons to be learned. The example of **Ireland** shows that equal opportunity is an obligation but does not translate into policies. Some modest pilots have not even been published.

The experience in **Andalucia** involves the Ministry of Finance. There is a law which makes gender impact assessment compulsory. Regulations regarding statistics have been changed as well, it is compulsory to register sex as a category and to produce gender statistics. Still, the contents of these policies are not really emancipatory.

In **Berlin** the method used during the pilot phase has been an incidence analysis (analysis of the users of certain public services resp. products). The initial pilot has been extended aiming at including more products and budget items in the analysis. The experience shows that there is a need to define equality goals beforehand. Even though the exercise is carried out by the administration in Berlin, politicians do not pick up the results of the analysis. Important political measures (e.g. an increase of fees for childcare) are not subject to a gender analysis. There is an urgent need to politicize the Gender Budgeting process in Berlin.

The analysis of initiatives throughout Europe made clear that Gender Budgeting activities, especially at the government level, are mostly at the stage of pilots. Governments are asked to account for decisions and its impacts on gender. This is a very new and challenging situation. Especially governments without specific gender insights try to apply some techniques and the subsequent results are not satisfying. There is a need to bring together the existing (good) feminist analysis which is done outside government with the current analysis inside.

Outside government initiatives play a very important role in watching and monitoring. There is a need to scrutinize governments for doing the right things. There is a need to be clear on what to do and to be very clear about results as well as expertise.

Methodological challenges are

- the need for the development of distributional analysis going beyond counting male/female beneficiaries and taking the context into account;
- the development of meaningful benchmarks and targets to make clear what the goals are;
- the contextual analysis.

There is a tendency among governments to understand Gender Budgeting as a technical exercise. It is necessary to link it to policies. From the point of view of outside government initiatives it is not possible to make a distinction between techniques and feminist analysis. The techniques itself also define potential political messages.

There is a need to expand the notion of what Gender Budgeting is and should be. The inclusion of unpaid work in the analysis is indispensable. There is a need to integrate the dimension of welfare production. We need to understand how welfare, social production is produced.

In the face of current developments to downsize government, aspects which gain importance, like outsourced employment and subcontracted work, have to be included into the analysis.

The changing concept of the state is an important reference point. Women say yes to the state. But we need to refine the feminist points of view on strategies how to develop a democratic state. Currently there is a change from social security policy to military security policy. We have to contribute to the discussion with feminist contents about the role of the state, defining what the state has to do.

Current discussions on new public management, performance oriented administration and budgets etc. are a potential point of entry for GB. But at the same time there is a need to reveal the problematic dimensions underlying these new concepts of state activities.

Keeping an eye on the feminist and gender objectives is of crucial importance! There is a need to link technical expertise with political work!

## 2.2.2 PANEL II – EXCHANGE OF EXPERIENCE II

- **How far has Gender Budgeting proven to be an instrument to promote gender equality goals and to bring emancipatory policies on their way?**
- **What are the potential limitations of Gender Budgeting in the context of our initiatives?**

In her input to open the discussion, **Priya Alvarez** (Basque country, Spain) focussed on the experience in the Basque country, an inside government initiative. There the focus was on developing a methodology. The process was initially rather broad, involving leading international experts on gender budgeting and a broad range of practical training activities as well as on the job consulting. Still, the process has got stuck in the finance department. A new focus is now on public companies which were created in order to reduce the fiscal deficit. There are many special aspects which should be included in the analysis. Subsidies and grants should be analysed as well as consultancy issues which are often difficult to track, particularly in information society and technology issues.

**Elisabeth Stiefel** (Germany, Cologne) initial contributor as well, pointed out that there is a need to deconstruct what equality means today. There has been a tendency by state institutions to cut down everything that serves women. In this context it is especially important to look at the interdependence of budgetary measures with unpaid work.

The discussions among experts revealed a general feeling that things have moved on, but still basic awareness rising is necessary. There is a need to take a broad approach. We need to take the economic framework into account and deconstruct the economic discourse. Taking the example of “efficiency”: it is a very narrow concept. If we want to use it, we need to redefine it, it must not be reduced to monetary costs and benefits.

In this context there are problems with data. There is a need to take forms of input into account which are not easily identifiable (like efforts, energy). It was suggested to broaden the notion of quantified data.

Again, the topic of unpaid work surged as an important element of Gender Budgeting analysis. Unpaid work can be seen as a form of real tax. And especially women do (a lot of) unpaid work. In approaching unpaid work the point of view is important: With reference to equal opportunities in the labour market, unpaid work is just seen as an obstacle. We need to ask what is done for welfare in household sector compared to welfare in the market sector. There is a lot of value added generated in the household sector.

There is a need to do more agenda setting on the topic of unpaid work, as political change is perceived to lie in agenda setting. It has to be made a public theme. A first aim in this context should be to delegitimize cutting expenditure with negative impact on unpaid work.

In general, the need to concentrate rather on structures and structural contexts than on details is articulated. Gender Budgeting initiatives need to be careful not to get lost in detail. Structures of budgetary policies are important. We see a tendency towards increasingly rule based fiscal policies, zero deficit policies, etc. which often lead to sharp expenditure cuts.

One main question for Gender Budgeting initiatives is how to move beyond the actual impasses. There are some successes with pilots. But the big picture of government policies is dominated by outsourcing, privatisation, expenditure and service cuts etc., often to the detriment of women and equality. There is a need for European-wide projects to monitor expenditure cut backs in terms of actual services, spill over for unpaid work and other main developments in fiscal policies. It is clear that Gender Budgeting is not about the “distribution of peanuts”. There is a clear need to widen the point of view and look at how the state is changing as well.

In this context the European policy framework, the fiscal policies and policy restrictions of the European Union are of major importance of the analysis. Concrete projects with regard to the EU level could be an analysis of the EU budgets, of the integrated policy guidelines and macroeconomic policies as well as of the frame for fiscal and monetary policies.

In order to promote emancipatory policies it is clear that gender statistics and analysis as such are not enough. Concrete gender equality goals need to be formulated as a leading thread through the analysis in order to avoid the danger of losing the aims out of sight in view of a lot of detailed analytical work.

### **2.2.3 PANEL III - PARTICIPATORY APPROACHES**

- **Gender Budgeting as a means to promote deepening of democratisation in budgetary policies**

The question of participation has two aspects: Do Gender Budgeting analyses lead to more democracy? And: Is the success and the relevance of Gender Budgeting dependent on the participation and lobbying of women's groups and networks?

In her introductory remarks to this session, **Regina Frey**, Berlin, pointed out that we have to talk about direct and indirect participation. In the case of Berlin, direct participation has not worked. Indirect participation was to some extent successful. The initial phase in Berlin was characterized by campaigning and lobbying to put Gender Budgeting on the agenda. When Gender Budgeting was implemented in Berlin, the civil society initiative got a seat in the Gender Budgeting steering group located within the administration. This participation was important to get information and shape the process to some extent. But, on the other hand, the contact to women's groups in Berlin was lost in the process.

Regina Frey stressed that NGOs cannot do the work for the government and they cannot take the responsibility for what the government is doing. In this context Gender Budgeting is a question of accountability of the government to be presented by governments themselves. Civil society initiatives' responsibility is to critically watch and comment what is going on. Frey concluded that the experience shows that it is not possible to do both, work as experts and work with civil society groups.

The Berlin initiative tried to develop links to initiatives aiming at direct participation in budgetary matters (people's budgets/"Bürgerhaushalte") in order to have Gender Budgeting included in these efforts. But it actually turned out that there is a tension between people's budgets and Gender Budgeting.

In her input to open discussions, **Ailsa McKay**, Scotland, pointed out that the country context is important. In Scotland Gender Budgeting is more focussed on the Ministry of Finance. The democratic question is "why?". Initiatives have to master the art of the democratic question. Gender Budgeting has the potential to be more effective, because we ask the democratic question to finance issues. Facing this, politicians tend to get frightened. The whole process is political, it deals with democratisation of economic analysis.

In the subsequent discussion it was underlined that Gender Budgeting is really effective in drawing women and economics together. The importance of transparency, which is obtained by meaningful Gender Budgeting should not be underestimated. In the face of concealed policies of redistributions of income towards the top, which is going on in many countries, how to achieve transparency is an important issue.

It is important for initiatives to find alliances, other groups in civil society, political parties etc. But it is clear that it takes a lot of time to involve and motivate other women and women's groups. Alli-

ances could be found in many contexts, e.g. women in administrations, women at universities, women organized in churches, women from parties.

The focus on participation is multifaceted and complex. There are multiple forms and sites of participation. There may be different ways in different contexts. Still, transparency is always a crucial issue. We have to improve people's understanding of budgeting processes.

The question is what Gender Budgeting initiatives can do. An important aspect is to be plugged in to different kinds of networks, especially establish links to progressive women's networks. Initiatives have to try to get in the expertise. In the UK for example, the WBG has established regular contacts with and access to the Ministry of Finance. By this means it is possible to position its expertise. The opportunities differ according to the specific situation. Finding ways towards democratisation is a special challenge when dealing with finance ministries.

Entry points at the local level might be easier to establish. In many countries the economy of communities is changing very fast. There is a tendency to shift all social problems to communities and drain their financial capacities. The European and national level policies often restrain financial resources at lower levels. This occurs in parallel to processes demanding more participation.

Participants agree that the success and relevance of depends to a large extent on the participation and lobbying of civil society initiatives and women's groups.

#### **2.2.4 PANEL IV - STRATEGIES VIS A VIS GOVERNMENTS**

##### **▪ Lobbying, Public Relations, Sensitization**

In her opening input **Sheila Quinn** presented the experience of Ireland where three activities both, inside and outside government existed at a certain point in time, but nothing survived. The reasons are threefold: lack of political will, civil society was co-opted in an arrangement of partnership and in Ireland there is a situation of a large surplus leading to "give away budgets".

In her input **Diane Elson** brought in the experience of the UK Women's Budget Group (WBG), one of the very first Gender Budgeting initiatives. A primary strategy of the WBG was initially to set up a watch dog organisation and a network organisation bringing together expertise. This continues to be at the core of the WBG. The central focus of the WBG's activities is on two official budget documents presented annually: the budget (on taxation etc.) and pre-budget paper (expenditure). The WBG coordinates reports to these documents which are distributed widely (to ministers, officials, key parliamentarians, selected members of the press etc.).

The WBG differentiates itself from lobbying of specific interest groups. It presents itself as bringing together all these expert views. Channels to transmit its messages are manifold. One is the Women's National Commission, representative of all women's organisations. Good relations to key members of the Labour party are important. The WBG has also worked on a project within the Ministry of Finance and managed to influence guidelines given for the review of public spending. The press should get more attention.

The WBG's strategy is to work in close contact with the Finance Ministry. A key entry point has been a high level female minister. It is a strategic choice on how far to get involved with the Ministry. By showing cooperation and basic agreement with policies it might be possible, according to Diane Elson's experience, to reach more than by voicing mere opposition.

Initiatives should and want to influence governments, but the question is on how to stay independent. It is also a question of what compromises one is ready to engage in. Civil society initiatives often feel a responsibility to pressure the state and put forward its ideas on what is important to do. The question is what to lobby for. Gender Budgeting initiatives tend to focus on broader issues of

public finance and bring a broader picture into the analysis. When states take over, control by civil society initiatives gets lost. Institutionalised Gender Budgeting projects tend to focus on very different questions. There is a tendency that the ambitions are sharply reduced and the approach gets reduced to banalities within the state. Even though institutions do have equality goals they are actually hardly ever a major element in the institutions' activities.

An important focus should be on lobbying on targets and indicators in order to make (lack of) progress visible.

The links and differences between Gender Budgeting and Gender Mainstreaming have been a major topic of concern and discussion. On the one hand there is the definition by the European Council, which defines Gender Budgeting as an application of Gender Mainstreaming in financial policies. On the other side there is the experience with the implementation of Gender Mainstreaming with results which are at least very ambiguous.

Weaknesses of Gender Mainstreaming (GM) are manifold: methods are rather weak, application of GM is stuck in areas of less importance, the emancipatory dimension has faded away, de facto equality is not that much at the forefront. GM lacks mostly the participatory dimension. But, as GM is in many documents and it is declared policy of most governments it is difficult to let it completely aside. There is a need for new, strong structures with sufficient resources in order to make it work.

An important challenge is to establish strong links between an emancipatory political agenda and adequate GM and Gender Budgeting techniques. In the face of the failure of GM what is needed is to take forward the technical know how and link it to the needs of women and the feminist agenda. We really have to have our concepts clear. Conceptualising could be used as a strategy.

The example of Berlin shows that GM and Gender Budgeting have been implemented in a parallel way. Major policy implications of the exercise are still awaited.

Gender Budgeting within the government will only work if the Ministry of Finance is involved. It is a "messy business", it is a political strategy; aimed at getting governments to think about equality. It is important in the face of governments reluctance to act transparently. The success depends on how much governments can be made to care about equality!

Benchmarking is crucial. Targets and indicators may be a point to build-in something that's survivable.

### **2.2.5 PANEL V – COMMON ACTIVITIES**

- **Adoption of the Declaration: "Gender Budgeting in Europe – NOW!"**
- **Future Strategies – Lobbying and Networking**

At the meeting in Vienna, the European Gender Budgeting Network was established. Its purpose is:

- exchange of experience
- access to resources and expertise
- make material accessible to a wider audience
- keep GB on the agenda, pro-active activities

The functioning of the network will be characterized by decentralized activities. The primary focus will be on developing research projects in order to further develop Gender Budgeting, seek funding for networking activities and establish a website to publish material. Thanks to Priya Alvarez from

the Basque Country, Spain, the website is already online:  
<http://www.infopolis.es/web/GenderBudgets/eqbn.html>.

The adoption of the resolution on Gender Budgeting to policy leaders throughout Europe (see next page) was the first common activity of the European Gender Budgeting network.

The resolution „Gender Budgeting in Europe – NOW!“ was adopted during the European Gender Budgeting meeting in Vienna and called upon the European Commission, the European Parliament as well as European states to speed up the implementation of Gender Budgeting at all levels of government. The resolution contains a series of concrete measures which could foster the implementation. The resolution was sent to key members of the European Parliament, the president of the European Commission as well as key commissioners, to heads of state and government in Europe and to finance ministers. The resolution found resonance especially in some Scandinavian countries, whose leaders reaffirmed their commitment to integrate gender considerations in financial policies.