

New development: Gender (responsive) budgeting—a reflection on critical issues and future challenges

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Abstract

Gender budgeting needs to become institutionalized more strongly in our societies and public policies. The article suggests some of the possible challenges to be taken into consideration to make it 'work', including availability of technical capacities and data, securing support in the political agenda, involving stakeholders, balancing spontaneity and standardization, and considering wider sources of inequality.

IMPACT

Gender budgeting has an important unexploited potential. However, much more needs to be done for it to become institutionalized. A stronger commitment by practitioners, policy-maker and scholars is needed. This paper suggests possible conditions to make it work.

Keywords: Gender budgeting, gender gap, inequality, public budgeting, gender-responsive policies.

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Introduction

Ensuring a better gender balance in policies, organizations and society has been widely advocated as being beneficial, not only to reduce inequalities, and ensure fairer societies, but also to strengthen productivity (for example OECD, 2016; IMF, 2017). There is wide agreement on the potential of gender budgeting to play an important role in making public policies more gender responsive (Rubin and Bartle, 2005; OECD, 2016; IMF, 2017). Paradoxically, however, this ‘taken-for-grantedness’ of the positive effects of gender budgeting does not appear to guarantee it becoming mainstream. On the contrary, gender budgeting is used less widely than might be expected (OECD, 2016), and, while some of its impacts have been pointed out (for example changes in policies), its full potential is probably far from being reaped. This article does not seek to demonstrate why gender budgeting should be adopted. Rather, I describe its state of the art, and reflect on the main challenges and possible ways ahead for strengthening, consolidating and institutionalizing gender budgeting in the public sector.

‘One, no one and one hundred thousand’*: the multiple meanings of gender budgeting

Gender budgeting has been defined as ‘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’ (Council of Europe, 2009). Similarly, a ‘gender-responsive budget’ is ‘a government budget that explicitly integrates gender into any or all parts of the decision-making process regarding resource allocation and revenue generation’ (Rubin and Bartle, 2005, pp. 259–260). In general, gender (responsive) budgeting involves using the tools, techniques and procedures of the budget cycle in a systematic way to promote gender equality (OECD, 2017).

*This subheading was inspired by Luigi Pirandello’s 1926 novel *Uno, nessuno e centomila*.

'Gender budgeting' refers to a multiplicity of techniques, tools and logics. Reviews of practices point to a range of approaches (see table 1), which apply to any phase not only of the narrowly-defined budgeting process (preparation and approval), but also the ensuing execution and reporting stages (for classifications, see Rubin and Bartle, 2005; OECD, 2016). For example, *ex ante*, during budget preparation and approval, the incorporation of a gender perspective may require gender budget baseline analysis, and gender needs assessment, or incidence analyses. During budget execution, it may imply gender-responsive guidelines for discretionary spending and for outsourcing. *Ex post*, in the reporting stage, gender perspectives will be incorporated in audits or spending reviews.

Table 1 - Approaches to gender (responsive) budgeting

Phases of the budgetary process	Examples of approaches and tools
Budget preparation and approval	Gender policies incorporated in budget guidelines, budget baseline analysis, gender specific priorities in budget allocations, gender needs assessment, incidence analyses, definition of gender responsive outputs and outcomes.
Budget execution	Gender-responsive guidelines for discretionary spending, outsourcing, staffing.
Reporting and audit	Spending reviews, gender-responsive audits.

Source: authors' elaboration from Rubin and Bartle (2005: 264) and OECD (2016).

Interpretations of gender budgeting swing between two complementary views. On the one hand, they point to gender budgeting as a technical tool, or a bundle of tools and techniques, to support allocations and decisions (gender budgeting as 'practice'). On the other hand, they refer to gender-responsive logics to make gender issues more visible, to bring about change, to ultimately promote (gender) equality (gender budgeting as 'logics'). Indeed, the implementation of gender-responsive tools is often said to require underlying gender-responsive logics and a cultural change. At the same time, a lack of such a culture may easily become an excuse for not implementing new systems, or for justifying failure. However, tools can often become drivers of change—the means through which new ideas, values, and beliefs

are introduced, become accepted and then embodied in routines, habits and thus become part of a renewed culture. As such, gender budgeting does not only require an existing culture, but can become an important driver of cultural changes, with the two 'sides' of gender budgeting feeding each other in a virtuous circle.

Gender budgeting: light and shadow

Gender budgeting has been proposed as one of the possible tools to tackle inequality and the gender gap, starting in the 1980s, and then more widely in the 1990s and the new century. However, gender budgeting and, more generally, gender-responsive policies are certainly not mainstream. Gender inequalities still remain embedded in our societies and in public policies. For example, while some progress had been made in tackling gender gaps, pay gaps remain significant, and the main burden of unpaid work still falls on women (IMF, 2017). As pointed out in a recent OECD (2016, p. 1) report: 'gender gaps persist in education, employment, entrepreneurship and public life opportunities and outcomes'.

With specific reference to gender budgeting, increased adoption and implementation has been documented (see, for example, OECD, 2016; IMF, 2017; O' Hagan and Klatzer, 2018), and some of its effects have been pointed out, for example in terms of impacts on allocation of resources, changes in policies, or on final stakeholders (OECD, 2016). Interest in gender budgeting is again on the rise, and the debate is open on how it can be adopted and implemented to close gender gaps. However, much remains to be done to institutionalize its practices and logics so that it can fulfil its potential.

There appears to be a certain degree of agreement on the potential benefits of gender budgeting, and an interesting variety of tools available. However, further reflections and actions are needed to understand if, and how, it can be embedded in our public policies and societies. The remainder of this article focuses on possible issues that need to be addressed to strengthen gender budgeting and to make it more institutionalized. While it is not easy to propose easy and ready-made solutions, this article points to possible challenges which should be taken into consideration to make gender budgeting 'work' and invites more debate and reflection on how they could be addressed.

Institutionalizing gender budgeting: critical issues and future challenges

Securing capacity and availability of data

In the era of Big Data, it seems almost a paradox to point to the availability of data as a necessary enabler of gender budgeting. However, one of the stumbling-blocks of gender budgeting initiatives appears to be the limited availability of necessary data. Along similar lines, lack of resources and capacity (for example, analytical capacities) may hamper a successful implementation of gender budgeting. It is important to note that, sometimes, a scarcity of data, resources or capacities may hint at an underlying lack of commitment from leaders and relevant decision-makers.

Gaining centrality in the political agenda

Inequality remains one of the major challenges of our time. Yet, it appears that gender inequality is not necessarily high on the priority list of today's governments and political parties. Especially in the current context, where populist tendencies and social media influences are becoming stronger, the political agenda has come, even more than before, to be dominated by issues which immediately attract voters' and politicians' attention, such as immigration, terrorism and crime, Brexit, or natural or human-induced disasters.

In this context, in spite of the increasing worries about phenomena like femicides, or the impact of aging populations on care and pension systems, gender issues are often found towards the bottom of a government's lists of 'emergencies'. Incentives are thus needed to ensure that governments and politicians commit not only to a formal use of gender budgeting (as 'practice') but embrace it as an underlying philosophy to guide the policy cycle (as 'logics').

This requires finding ways to ensure that governments are held accountable to their electorate for their commitment to gender budgeting and gender responsiveness. For example, by making the benefits of gender budgeting more visible, in easy and accessible ways, to the general public. Indeed, while in principle gender budgeting should serve, among other things, to make differential impacts of political decisions on men and women clear, not much of the related information seeps through to the public. As public consensus remains central to political parties and populist movements, but there is a need to raise public awareness of the impact of choices on genders. Without this visibility to the main stakeholders, it will be difficult to ensure that gender budgeting and gender-responsive policies become central in domestic political agendas. These considerations also suggest the relevance of stakeholder involvement.

Involving stakeholders

Gender budgeting is no longer (or not only) a battle being fought by feminist or radical movements but, rather, it is now being promoted as a good practice by most international and supranational institutions. This may provide a strong support for its adoption internationally and in a 'top-down' fashion. However, this could also end up condemning gender budgeting as yet another 'élite' technical tool promoted by distant 'technocracies'. As such, this commitment should be accompanied by increasing engagement of national governments, civic society and potential 'local' stakeholders,

The first challenge faced by the gender budget 'movement' is therefore to ensure that those who can benefit from the spread of gender-responsive practices and policies are made aware of the issues at stake, how they can benefit from gender budgeting, and to get them involved in and committed to the related processes. They also need to be put in the position to hold their governments accountable for its introduction and implementation (and for the related consequences on their lives, on society, on the economy).

Paradoxes of citizens voting against their own interests (for example less affluent voters supporting parties which favour affluent citizens, or immigrants voting for anti-immigration parties, or women voting for candidates who disrespect women's rights) are well known and may suggest the need to ensure citizens are better informed on the (likely) impacts of political programmes and policies. Among these, gender-related impacts of policies may be obvious candidates. More generally, gender budgeting may become an important tool to raise awareness, not only among specialists and experts, but also among citizens. This would require making its benefits and impacts on policies and political choices more visible, in easy and accessible ways, to the general public. As such, gender budgeting, and the related data and information, should become accessible, understandable and understood by its own stakeholders.

A further stage would be to explore further the potential of gender budgeting as a form of involvement and engagement of stakeholders. Conceiving of gender budgeting as a participatory tool, or a co-production form (see also Anessi *et al.*, 2016; Barbera *et al.*, 2016), may be one of the future challenges for its supporters and advocates.

Balancing spontaneity and standardization

One of the main challenges facing gender budgeting advocates is how to ensure the right balance between standardization of practices, and spontaneity and adaptation to contexts and needs. The absence of 'established' practices to consider as standards may give its side to an instrumental use of the tool, and the subsequent lack of trust from potential users and stakeholders, also reducing the likelihood of continuity, and of comparability of experiences over time and across space. Conversely, the existence of established practices, and their diffusion, may facilitate the adoption of gender budgeting, and also foster trust in the related documents, tools, reports, information, as well as in the actions and decisions adopted on their bases. As such, the professions involved may play an important role in strengthening the trust in the tool and suggesting established and successful practices. However, the need for standardization and guaranteeing the quality of information provided has to be balanced with the need to ensure responsiveness to different situations, contexts and needs, to avoid gender budgeting becoming detached from the reality where it is going to be used and implemented.

Considering wider sources of inequalities?

Closing gender gaps and reducing gender-related inequalities may already appear a challenging and daunting enterprise. However, multiple sources of vulnerability and inequality exist and significantly affect people, society and the economy. As such, even if gender (responsive) budgeting is not fully established, current experiences with its practices and logics may provide useful examples and references for a wider, more comprehensive reflection and for taking actions to identify, face, and fight other sources of inequalities, including poverty, migrant status, age, health conditions and race. This suggests that there may be a more general need to ensure stronger transparency and awareness on how budget processes and allocations benefit differently not only men and women, but different categories of citizens, and how this impacts on inequality, inclusion, growth and wellbeing. This may be especially important in the face of demographic changes, which are shaping the demand for public interventions, as well as of ongoing austerity policies, which are affecting governments' responses to such changing needs.

Conclusions

Gender budgeting has a potential to address inequality that has not been fully exploited. This article points to some possible areas of development for gender budgeting, focusing on the conditions needed for it to become institutionalized in public policies and society. These include securing the availability of technical capacities and data, gaining traction in the political

agenda, stakeholder involvement, balancing spontaneity and standardization, and considering wider sources of inequality. This article aims at encouraging further debate and dialogue on gender budgeting and, more generally, on the conditions which make it 'work', so as to contribute to address the gender gap, and more generally, the rising inequalities that are plaguing our society (and economy).

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