

10-24-2008

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Recommended Citation

Bartle, John R.; Rubin, Marilyn Marks; and Issarachaiyos, Sikarn, "The Challenge of Implementing Gender Budgets" (2008). *Public Administration Faculty Proceedings & Presentations*. 2.

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The Challenge of Implementing Gender Budgets

by

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October 24, 2008

ABFM Annual Conference
Chicago, Illinois

This is an expanded version of "Gender Budgeting Update: Next Step - Implementation," PA Times (September, 2008), p. 5.

Over the last three decades, countries all over the world, supported by the international community of nations, have been moving toward more equitable treatment of women. In 1979, the United Nations adopted the Convention on the Elimination of All Forms of Discrimination against Women (CEDAW), often referred to as the international bill of rights for women. CEDAW has been ratified by more than 90 percent of the nations in the world, with the United States the only industrialized nation in the world that has yet to ratify it.

Delegates to the United Nations Fourth World Conference on Women held in Beijing in 1995 re-affirmed CEDAW and extended its purview by calling on governments to incorporate a gender perspective in their budget processes. Rubin and Bartle (2005) detailed the more than 60 initiatives that have been undertaken all over the world to look at budgets through a gender lens, and reviewed the lessons learned from these initiatives. They used the term “gender-responsive budget initiative” to include (1) the actual integration of a gender perspective into the budget cycle at the national or subnational level of government, and (2) an organized movement by civil society organizations to influence government to incorporate a gender perspective into its budget decisions.

Here, we first briefly review some of the changes around the world in gender budgeting to update the 2005 study. Then we look in more depth at three initiatives in the US and Canada to gauge their progress in gender budgeting and to further understand what is necessary for success in implementing a gender-responsive budgeting initiative.

Worldwide Update

The United Nations Development Fund for Women (UNIFEM) provides a useful source to update the gender-responsive budget activities in various countries.¹

Arab States

- Egypt: The Ministry of Finance issued budget guidelines for FY 2009 that highlighted gender concerns. Also, the Ministry is now working on sex-disaggregated statistics for FY 2009, and gender disaggregated budget templates. The Egyptian Deputy Finance Minister stated that Egypt can fully apply gender-responsive budget by FY 2010.
- Morocco: In 2008, a gender budget report, identifying gender gaps and sectoral interventions, was submitted with the draft of Finance Bill to Parliament for a third consecutive year. A report by the Ministry of Finance asserted that the

¹ United Nations Development Fund for Women (UNIFEM). Gender Responsive Budgeting: Newsletter, Issue 1 (February 2008) & Issue 2 (August 2008). Retrieved September 27, 2008 from http://www.gender-budgets.org/component/option,com_frontpage/Itemid,1/

gender-responsive budget has helped improve resource allocation by increasing the school enrollment rates of young girls in rural areas, the rate of access to drinking water, and the percentage of women beneficiaries of agricultural extension services.

Europe

- In southeast Europe (Albania, Bosnia and Herzegovina, Macedonia, Moldova, Montenegro and Serbia), with support from the governments of Austria and Finland, these nations have created a baseline of the budgetary processes, ongoing reforms, relevant capacities, and entry points for gender-responsive budgets.

Africa

- A joint United Nations program on gender equitable local development (GELD) will be launched in some local governments in Senegal, Rwanda, Mozambique, Sierra Leone, and Tanzania in November 2008 with financial support from the government of Belgium. The program aims to improve women's access to resources and services by promoting the application of gender responsive planning, programming and budgeting.
- Ghana held the Accra Women's Forum on August 30, 2008 to mobilize women's rights organizations, activists and gender advocates; and to strategize and ensure that gender and other cross cutting issues would be addressed on the agenda of the Third High Level Forum on Aid Effectiveness on September 2-4, 2008.

South America

- Ecuador: The country has included gender equity as a selection criterion for investment projects in the national budgetary guidelines for 2008.
- Venezuela: The government included gender equality principles in the national budgetary guidelines in 2006, presented the budget law with a gender perspective for the fiscal years 2006 and 2007, and emphasized gender equity in the national planning priorities for 2008.
- Peru: The Congress "ensured the allocation of resources to equitably benefit women and men" by approving an amendment to the Budget Law in September 2007.

Asia

- Nepal: The Ministry of Finance formally introduced a gender-responsive budget in FY 2008.
- South Korea: The Ministry of Planning and Budget included gender in the budget guidelines for FY 2007. In line with the 2006 National Finance Act, the submission of gender budget and balance reports will be mandatory beginning in FY 2010.

- India: A gender perspective has been incorporated into budget processes, and more than fifty departments established gender budget units in the departments. In addition, the Ministry of Women and Child Development organized a workshop to sensitize senior officials towards gender-responsive budgets in February 2008.
- Pakistan: Gender-sensitive amendments were introduced into the federal and provincial call circulars for the FY 2008 budget. Thus, each ministry is required to indicate gender-related objectives in its policies and objectives and to ensure that all relevant performance indicators are sex disaggregated.
- Malaysia: The Finance Ministry urged each ministry to include gender-sensitive issues in budget submission for FY 2009.

North America

San Francisco

In 1998, San Francisco became the first government in the US to pass its own CEDAW ordinance. This should not be surprising since San Francisco is perhaps our nation's most progressive city and has long been in the forefront of the women's movement. The ordinance has resulted in some positive steps city-wide and in a few departments. However, neither San Francisco's political leaders nor its civil society organizations have been proactive in promoting the consideration of gender in budget decisions. The one exception is the San Francisco Board of Supervisors' resolution in 2003 asking City departments to look at the gender impact of potential budget cuts on their workforce and activities. The Board is San Francisco's legislative body.

In 2003, Gavin Newsome was a member of the Board. He is now San Francisco's Mayor and this is probably one of the reasons that things may be changing. Ann Lehman from the San Francisco Department on the Status of Women (SF DOSW) recently told us that: "It appears that San Francisco has been re-energized to do more gender budgeting work. The Mayor's budget staff is undergoing gender budget training and the City has begun to take this work to the private sector to develop gender equality principles for private sector enterprises."

The next steps include getting more departments to understand why they should examine their budgets through a gender lens, and encouraging them to collect disaggregated data by gender. Emily Murase, Executive Director of SF DOSW has pointed out in the past that: "Drilling down to this level of detail is essential to understand patterns of discrimination and to recommend policy change."

It also seems to us that it is time to reactivate the public-private coalition that was responsible for the City's 1998 CEDAW ordinance to help "spread the word" that the

progress of women and girls in San Francisco can be catalyzed by their equal treatment in the city's budget.

Fulton County, Georgia

Fulton County, the second government in the US to consider implementing a gender-responsive budget initiative, is the largest county in Georgia. It includes part of Atlanta, the site of international meetings on gender related issues, including gender budgeting, hosted by the United Nations in 2006 and 2007.

Shortly after the 2006 meeting, the County began its gender equality initiative, spearheaded by Nancy Boxill, one of the seven members of the Fulton County Board of Commissioners – the County's governing body. The initiative included the creation of a County Gender Equality Policy Statement and an internal Gender Equality Taskforce as well as a provision for gender budget training. Fulton County Gender Equality Taskforce members, Dr. Ann F. Harris, Deputy Director for the Office of Equal Employment Opportunity and Sharon Whitmore, Assistant Director for Finance, have told us that "in addition to these pro-active steps, five pilot departments have completed a detailed gender analyses of select programs to identify service delivery gaps along gender lines and have proposed strategies for correcting the identified disparities." Five more departments will undertake gender analysis and gender budgeting activities during FY 2009.

With respect to its gender budgeting initiative, the County's Finance Department has issued FY 2009 Budget Guidelines that include a request to departments to include gender-specific data and information in their budget submissions showing how service delivery outcomes as well as potential budget cut-backs would impact women, men, boys and girls. This makes Fulton County the only government in the US that has thus far explicitly integrated gender considerations into its budget process. The County has also provided gender equality training to all department heads, elected officials and senior managers in preparation for FY 2009 budget activity.

Canada

In November, 2007 the Standing Committee on the Status of Women of the Canadian House of Commons began a study of gender-responsive budgeting. The Committee held a series of hearings and heard testimony from several people. Among their findings were that because of their different socio-economic status and living conditions, there are differential effects of governmental policies and programs, as well as budgetary measures. The Committee found gender-responsive budget to be an important tool to improve and correct gender inequality, and enhance women's empowerment. Clare Beckton, Coordinator for Status of Women Canada, said that "gender responsive budgeting reduces the socio-economic disparity between sexes and

improves effectiveness, efficiency, accountability and transparency of government budgets.”²

In June 2008, the Committee issued its report with recommendations on implementing gender budgeting to Parliament and the Prime Minister. They include:

- Developing a plan to incorporate gender into Canada’s budget cycle by January 2010
- Creating a unit of gender analysis experts at the central level of government to undertake gender-based analysis of tax and other macroeconomic policy
- Holding senior ministers accountable for implementing a real gender-based analysis in all government departments and tying their pay increases and promotions to this implementation
- Having Statistics Canada (the country’s national statistical agency) collect data relevant to gender budgeting and conduct gender analysis training
- Having the Auditor General conduct audits of gender budgeting implementation, and
- Creating a Commissioner of Gender Equality as an office of Parliament by December 2009
- Having Finance Canada undertake a gender-based analyses of new and current tax policy systems, as well as the distribution of benefits of current and new government spending initiatives
- Having the Treasury Board Secretariat develop and implement a policy requiring all departments to report on gender-based analysis by January 2009.

Although these recommendations do not yet have the force of law, they represent substantial movement towards the implementation of gender budgeting in Canada.

Conclusions

North America is behind many other parts of the world in the implementation of gender budgeting. It is too early to tell if gender budgeting will have any lasting effect in the US or Canada. However the lessons from various countries make it increasingly apparent what is needed to make gender budgeting work. Drawing from our experiences, it is clear that on a technical level the basic requirements for success are the availability of gender-disaggregated data, and training for the people who will be preparing budgets at the agency level. However, the *sine qua non* for successful implementation is leadership from the top and the acceptance by central and agency budget offices that there are gender inequities to be addressed and that the budget can

² Ratansi, Y. (2008, June). Report of the Standing Committee on the Status of Women. *Towards gender responsive budgeting: rising to the challenge of achieving gender equality*. 39th Parliament, 2nd session, p. 20-21.

be a tool to address these inequities. And, it also helps to have members of the community push for gender-responsive budgeting as a way to improve the position of women in society. Time will tell if gender budgeting will become part of the toolkit of the fiscal analyst or a passing fad.

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Appendix

2008 Update on Gender Budgeting Implementation			Implementation
Nation	Level*	Implementation Status	Date
Egypt	C	Guidelines issued; Statistics disaggregated	2010
SE Europe	C	Planning	None
Senegal and others	L	GELD program launched Nov. 2008	
Ghana	C	Discussion	None
Ecuador	C	Capital budgeting criteria	2008
Venezuela	C	Budget and national planning priorities include gender perspective	2006
Peru	C	Budget law amended, Sept. 2007	2008?
Nepal	C	Implemented	2008
South Korea	C	Guidelines issued; implementation planned for 2010	2010
India	C	Implemented	2005
Pakistan	C	Implemented	2008
Malaysia	C	Recommended 2009	
Canada	C	Recommended to Parliament	
US	L	<ul style="list-style-type: none"> • Fulton County GA: voluntary 2009 • San Francisco: limited use • Los Angeles: Ordinance passed and training provided to City departments 	

* C = central level, L = local level