

### **Selected bibliography**

**Mainstreaming Equality: the things you really need to know, but have been afraid to ask...**

Equal Opportunities Commission,  
September 2003

Downloadable from [www.eoc.org.uk](http://www.eoc.org.uk)

Diane Elson

**Integrating Gender Issues into National Budgetary Policies and Procedures: Some Policy Options**

Journal of International Development,  
Vol 10 (pp929-941) 1998

Debbie Budlender and Rhonda Sharp

**How to do a gender-sensitive budget analysis: contemporary research and practice**

Commonwealth Secretariat and Australian  
Agenda for International Development, 1998

R. Fitzgerald

**Toolkit for Mainstreaming Equal Opportunities for Women and Men into the Structural Fund Programmes in Scotland**

Prepared for Scottish Executive and Equal  
Opportunities Commission, 1999

S. Swann

**European Equality Partnership Equal Opportunities Guidelines for European Programme in Wales**

Welsh European Funding Office,  
December 2000

S. Swann

**European Equality Partnership Applying for European Structural Funds in Wales, Equal Opportunities Additional Guidance for Applicants and Assessors**

Welsh European Funding Office, May 2003

Ulrika Lorentzi and Helen Lundkvist

**Just Progress. Applying Gender Mainstreaming in Sweden**

Fritzes Offentliga Publikationer, 2001

### **Useful website links**

**The Women's Budget Group**

[www.wbg.org.uk](http://www.wbg.org.uk)

**The Scottish Women's Budget Group**

[www.engender.org.uk/budget](http://www.engender.org.uk/budget)

**Examples of international practice and further links**

<http://www.genie.ids.ac.uk/search/results.cfm>

**Gender Budgeting Tools:**

[http://www.thecommonwealth.org/gender/html/publications/gms\\_pdf/Brochur](http://www.thecommonwealth.org/gender/html/publications/gms_pdf/Brochur)

# WHAT IS GENDER BUDGETING?

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**Gender Budgeting has been used as an analysis of government budgets to establish the differential impact of revenue raising or expenditure on men and women, but it can be applied to all forms of funding. The process is already being used around the globe. It can be a simple process, it's often just the case that the right questions just need to be asked!**

Budgets are most important as they reflect the spending choices a government or organisation has made to achieve social and economic objectives. Gender Budgeting is one of the tools identified in mainstreaming equality. Mainstreaming aims to build equality considerations into all stages of activities and strategies.

Most policy initiatives within Wales should be firmly underpinned by the principle to positively promote equality as the National Assembly for Wales is committed to equality through the Government of Wales Act contained in Article 120 i.e. the National Assembly for Wales shall 'make appropriate arrangements with a view to securing that its functions are exercised with due regard to the principle that there should be equality of opportunity for all people'.

Most budgets and initiatives are assumed to affect everyone more or less equally to serve public interest and demand, and could therefore be described as gender neutral.

However, what appears on the surface to be 'gender neutral', which would be expected to impact equally on men and women, may on closer examination be seen to be 'gender blind'. That is, the impact of the policy of budget expenditure may affect one gender very differently to another in fact.

A gender budget approach does not aim to produce a separate budget for men and women, but to analyse expenditure, or resource allocation from a gender perspective. In this way it identifies the impact and compares the implication of budgets and policies on both sexes.

This gendered approach can be described as wearing gender lenses, through which processes can be viewed, and can be effective at any stage of the budgetary process, including, planning, objective setting, auditing or evaluation.



# EXAMPLES OF GENDER BUDGETING

## Transport

A transport policy, where access to roads, trains, buses and other public transport methods is not restricted to the use of any group, may appear to be gender neutral. Anyone may use them. However, depending on how policy is designed, its actual usage may be gender biased. For example:

- \* Around 71% of all adults in Britain held a full car driving licence in 1999/2001 but there were large gender differences: 82% of men held a full licence compared with 60% of women. Government transport expenditure tends to favour roads.
- \* A total of 73% of men in Britain commuted to work by car in 2001, compared with 66% of women. Women were more than twice as likely to travel to work by bus (11% women, 5% for men). In fact, just 22% of men used a bus at least once a week compared with 32% of women. *Source: National Travel Survey - Transport 2000*

Subsidies for buses tend to be the lowest of all transport budgeted provision, so inadvertently, women's needs are not being fully catered for. Obviously, most buses are supplied for the busiest commuter rush hour providing transport to work places for before 9am, but women are more likely to work part-time or have flexible working patterns, and may need to reach childcare facilities before joining work. So, they could be disadvantaged by such a policy. A gender budget approach could inform service providers of how to increase usage in general by both men and women.

## Health Care

Biological or sex differences between women and men affect their need for health care. EOC commissioned research on gender and health highlighted the importance of understanding gender issues and linking these with resource allocation. Women's reproductive capacities give them 'special needs' relating to fertility control, pregnancy and childbirth. But there is also a growing volume of evidence to show that biological differences go far beyond the reproductive system with genetic, hormonal and metabolic variations affecting male and female patterns of heart disease, infections and a range of auto-immune problems. Health is also shaped by social gender. Differences in the living and working conditions of women and men and in their access to wide range of resources put them at differential risk of developing some health problems, while protecting them from others. Gender also influences the experiences of women and men as users of health care. In order to identify the gender issues and to link the policy objective and resource allocation, the Scottish Executive is undertaking a pilot on gender budget analysis in respect of a project on smoking cessation being undertaken by the Health Department.

## Public Service Delivery

In Sweden a gender budget approach was applied to the ambulance services. Initially this was assumed to be a gender-neutral service provision. All people were to be dealt with on equal terms, to be given the same level of care and treatment. The project was studied from all angles - who called the ambulance, how quickly did it arrive, how was the patient treated. Surprisingly, results showed that more women than men called ambulances but far more men were rushed to hospital at top speed than women. Further questions were then raised, are men and women treated differently, or are men in more emergency need? The study also turned up differences in the way women and men felt they were treated. Women found ambulance staff friendly but that they did not get enough pain relief, for men it was the other way round. Again men and women were found to be receiving a different service. This study is still on-going and has raised awareness issues, and budgetary impact questions in an area where previously gender issues had been nobody's concern. *Just Progress. Applying Gender Mainstreaming in Sweden (2001)*

## Sport

Many countries have carried out gender budgetary work in the area of sport and leisure provision. In Australia, driven by the links to health and welfare, they have started from the assumption that provisioning, for example through a leisure centre is gender neutral. Statistics quickly demonstrated that usage and participation was very different for men and women boys and girls. The reasons for this difference were evaluated and categorised and finances considered. Expenditure on maintenance of facilities predominantly used by men was compared to spend on activities used by women. (For example the cost of maintenance of a football pitch compared to a sports hall). Women's low participation was linked with 'time poverty', cost, childcare and access. Leisure centres were able to offer free ironing services, specific transport and childcare, in exchange for aerobics lessons. All these initiatives had direct impact on budgetary spend and allocation and the impact on increased participation is still being evaluated.

In Wales, the EOC is working with the Sports Council of Wales on a gender budgeting exercise to investigate the use of leisure centres, which will enable better planning, marketing and use of resources.

All people were to be dealt with on equal terms, to be given the same level of care and treatment

# A GENDER BUDGET APPROACH

## Why should I consider a gender budget approach?

### It's a way of measuring fairness.

Money talks!

There is no doubt that talking about money and resource allocation concentrates people's minds. There are however other clear advantages to adopting this approach. It can contribute hugely to a more equal economy and society in Wales that better recognises and rewards individual contribution and increases our national prosperity and competitiveness.

The practice of producing a gender sensitive budget will aid in tracing, and making transparent, the relationship between policy objectives and resource allocation. It can also identify assumptions and bias that they may reinforce gender stereotypes instead of challenging them.

## Policy

Gender Budgeting can inform policy making in a new way, ensuring that our resources are effectively applied equally, and become an effective tool in transforming our ideas of what is 'normal'.

A society where men work 9 'til 5 Monday to Friday for 40 years with the same employer, where women give up economic activity to stay at home upon marriage and care for children, family and the home; and where both stay married for life, is no longer a realistic 'norm'. However many of our policies and infrastructures are built around just such a norm. As working patterns and gender stereotypes no longer fit the experience of men and women in Wales, we need to make sure that policies and resources are most effectively targeted at their new needs.

A society where men work  
9 'til 5 Monday to Friday for  
40 years with the same employer  
...is no longer a realistic 'norm'

## The Economic Case

In Wales there is a clear need to encourage as many people as possible to generate wealth for the country and good incomes for themselves. This means that the National Assembly for Wales and UK government initiatives to help the Welsh economy need to be accurately targeted and efficiently implemented. However, if gender issues are not taken into account then well-intentioned schemes can falter.

For example, in general, women's income over a lifetime is less than that of men's. This is due to time spent out of the labour market and discrimination within it. Again, in general, women are 'time poor' compared to men. They carry the majority of unpaid caring roles including child and elder care, health and domestic responsibilities, have poorer access to private transport and therefore greater reliance on public transport.

Advice regarding the impact of life-cycle decisions is also lacking. A woman proposing to leave or take a break from the labour market, rarely receives adequate advice about the long term financial impact of such a break, including the pension implications.

A man, about to become a father, receives very little advice to facilitate more active fatherhood, or plan long term pension provisions, should he want to take a career break. Raising individual and organisations' awareness of the financial impact of their decisions makes good business sense.

Similarly economic policies aimed at getting people back to work, may enable a greater proportion of women than men, to enter or re-enter the labour market. However, these policies may, at the same time make women 'time poor'. The disproportionate effect of increased child and elder care costs, and the burden of domestic responsibilities are not addressed by these policies, unless a 'gender lens' is applied. Such policies need to be underpinned by effective approaches to address caring and unpaid activity burdens. Re-addressing paternity and unpaid caring roles can greatly reduce gender inequality. It can also assist in addressing business priorities; drivers and assumptions regarding maternity costs, help challenge gendered assumptions and encourage female entrepreneurship.

**Adopting a gender budget approach has an appeal to policymakers. It has clear links with economic prosperity, reduction of poverty (in particular child poverty), helps address social exclusion, and contributes to sustainability. Getting more people back to work assists in increasing productivity; redressing the gender balance in the caring role assists in preventing assumptions about who should take on certain roles; getting women into better paid, better recognised work, is not only fair, but also helps ensure pension provision. Where men and women are more able to equally access education and childcare, and are more equally represented in policy and decision making bodies, not only will decisions made be more representative, but social exclusion will also be actively addressed.**

Taking the gender budget approach asks fundamental questions about the needs of the consumer or recipient of services, and assists providers to meet their qualitative targets.

This approach can help in avoidance of false economies. It can help challenge gender stereotypes, and assist in tackling the long hours culture, which is currently the burden, largely of men. It can help challenge our cultures perception of the 'norm', and increase individuals' choices. Outdated concepts of working patterns can be challenged.

Where previous efforts have sought to address women's rights and needs in special and separate development programmes, the gender and development 'budget' approach calls for the different life courses of men and women to be considered at an early stage and requires the monitoring of the different impact of policies and programmes on women and men, girls and boys. This shift in focus recognises that the status of women cannot be addressed as a separate issue; it can only be addressed by considering the status of both sexes. And in doing so, it effectively improves the economy and society for all in Wales.

#### **How can I get started?**

We hope that the above demonstrates that you don't need to be an economist or accountant, to be able to be involved in gender budgeting, or to be able to see the impact and implications of such techniques. Gender budgeting techniques can appear complex and technical, but the principles can be simple and general. The gender budgeting group aims to bring together, in a mutually beneficial way, gender equality expertise and economic and financial expertise.

**The Wales Gender Budget Group (WGBG) is an independent network bringing together people from organisations that have a common interest in the promotion of gender equality through the gender budgeting process.**

The WGBG aims to promote gender equality in Wales through the effective use of gender budget tools in any policy decision-making and processes. The WGBG works closely with other gender budgeting groups in England and Scotland, including the Women's Budget Group, which works on a UK and international level and has gained extensive access to policy makers especially within the Treasury. They are able to be proactive on issues such as the national provision of childcare, tax credits, productivity and work/life balance. They are able to comment on major policy decisions such as the 5-year spending review and the annual budget.

The WGBG has a unique opportunity to further this work within the Welsh context, partly because of the commitment (through Article 120) to equality of opportunity by the National Assembly for Wales.

This legal imperative is unique and has already been the driver behind many practical implementations of equality programmes and in the approach to many of the devolved areas of public policy in Wales. This attitude to cultural change in Wales offers the Wales Gender Budget Group new and exciting entry points into the economic and policy-making strategies in Wales.

With so much high level, influential work on gender budgeting already taking place within the national and international debate, it is not our intention to duplicate or repeat any of this learning. Rather it is our intention to exchange good practice and build expertise within Wales on how this approach might have most impact on key devolved areas of the Welsh economy, policy and demography.

The Wales Gender Budget Group also aims to keep a library of relevant information and documents to provide more detailed technical information and guidance on gender budgeting- more useful reading.

For further information about the Wales Gender Budget Group please contact Adele Baumgardt, C/o of the Equal Opportunities Commission, Wales.  
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