



**SERVICE DE LA GESTION PUBLIQUE
PUBLIC MANAGEMENT SERVICE
COMITE DE LA GESTION PUBLIQUE
PUBLIC MANAGEMENT COMMITTEE**

PUMA/SBO(2001)7/ANN1
Non classifié/Unclassified

**L'ELABORATION DU BUDGET ET LA PROBLEMATIQUE HOMMES-FEMMES -- REPONSES DES
PAYS
A GENDER PERSPECTIVE ON BUDGETING -- COUNTRY RESPONSES**

**L'ELABORATION DU BUDGET ET LA PROBLEMATIQUE HOMMES-FEMMES -- REPONSES DES
PAYS**

22ème réunion annuelle des Hauts responsables du budget
Paris, 21-22 mai 2001
22nd Annual Meeting of Senior Budget Officials
22ème réunion annuelle des Hauts responsables du budget

For further information, please contact Jon BLONDAL or Michael RUFFNER
jon.blondal@oecd.org - Tel. +33-1 45 24 76 59; Fax +33-1 45 24 17 06
michael.ruffner@oecd.org - Tel. +33-1 45 24 16 32; Fax +33-1 45 24 17 06

JT00108037

**A GENDER PERSPECTIVE ON BUDGETING
COUNTRY RESPONSES**

**L'ÉLABORATION DU BUDGET ET LA PROBLÉMATIQUE HOMMES-FEMMES
RÉPONSES DES PAYS**

1. This year's **Survey of Budgeting Developments Questionnaire** proposed questions on "Budgeting with a Gender Focus" [under theme (vi)], as follows:

Le questionnaire de l'Enquête sur les évolutions observées en matière budgétaire offrira cette année aux pays de s'intéresser au thème de "L'élaboration du budget et la problématique homme-femme" [thème (vi) du questionnaire comme suit].

A GENDER PERSPECTIVE ON BUDGETING

The OECD is committed to achieving equality between women and men in all areas of public and private decision-making and is promoting this through its various activities. The budget is the prime policy instrument of governments and a number of Member countries have applied gender analysis techniques to budgeting.

The OECD and UNIFEM, the United Nations Development Fund for Women, are organising a major conference, to be hosted by the Belgian Government in Brussels on 16-17 October. The conference will showcase policies and techniques for applying gender analysis to the budget. As part of the preparations for this conference, the OECD is gathering comparative information on specific policies and practices in individual Member countries.

Member countries are requested to submit information on the extent to which they apply gender analysis to budgeting. This can include:

- Discussion in the budget documentation of the gender impact of various government programmes.
- Separate special reports on the gender impact of various government programmes.
- Availability of gender disaggregated data (*i.e.* separate information for women and men) for various government programmes.
- Co-operation with non-governmental organisations on analysing the gender impact of various government programmes.
- The use of historical data on gender impact when reforming existing government programmes or formulating new ones.
- Respective roles of the finance ministry, spending ministries, others (women's bureaus, etc.) in preparing and using this data.
- The legislature's consideration of gender impacts when deliberating various government programmes.

ÉLABORATION DU BUDGET ET PROBLÉMATIQUE HOMMES-FEMMES

L'OCDE s'attache à l'égalité des sexes dans tous les aspects de la prise de décision publique et privée et elle l'encourage au moyen de ses diverses activités. Le budget est le premier instrument d'action des autorités publiques et un certain nombre de pays Membres ont appliqué les techniques de l'analyse par sexe à l'élaboration du budget.

L'OCDE et l'UNIFEM, Fonds de développement des Nations Unies pour la Femme, organisent une importante conférence, qui sera accueillie par le Gouvernement de la Belgique à Bruxelles les 16 et 17 octobre. Cette conférence mettra en lumière les politiques et les techniques qui permettent d'appliquer l'analyse par sexe à l'élaboration du budget. Dans le cadre des travaux préparatoires de la conférence, l'OCDE réunit des données comparatives sur certaines politiques et méthodes qu'utilisent différents pays Membres.

Les pays Membres sont invités à faire le point de l'application de l'analyse par sexe à l'élaboration de leur budget. Parmi les informations qu'ils pourraient exposer, on citera :

- *L'examen, dans la documentation budgétaire, des conséquences pour les deux sexes des divers programmes publics.*
- *Les rapports spéciaux sur les conséquences pour les deux sexes des divers programmes publics.*
- *La production de données par sexe (établies séparément pour les hommes et pour les femmes) concernant divers programmes publics.*
- *La coopération avec des organisations non gouvernementales à l'analyse des conséquences pour les deux sexes des divers programmes publics.*
- *L'exploitation de données historiques dans la problématique hommes-femmes pour réformer des programmes publics en vigueur ou en formuler d'autres.*
- *Les rôles respectifs du ministère des finances, des ministères dépensiers et d'autres organes (agences de la condition féminine, etc.) pour élaborer et exploiter ces données.*
- *La problématique hommes-femmes du Parlement lors de l'examen des divers programmes publics.*

2. The following Member countries did not participate in the survey: Germany, Poland, the Slovak Republic.

L'Allemagne, la Pologne et la République slovaque n'ont pas fourni de réponse à l'Enquête annuelle.

AUSTRALIA

The Women's Ministerial Statement, a document that accompanies the Commonwealth Budget, provides information on Budget decisions with particular impact on women. For example, last year's Budget statement Strengthening Our Commitment to Women looked at the impact on women of key Budget measures including the Stronger Families and Communities Strategy, additional funding for legal assistance, welfare reform, health initiatives, and measures to assist indigenous and migrant workers.

AUSTRIA

No response made to this question.

BELGIUM

No response made to this question.

CANADA

There is a federal policy that gender-based analysis (GBA) should be used in the design of policies and programs. Capacity-building for this is underway but application is variable.

Status of Women Canada is working to increase the knowledge and skills of government officials and to accelerate GBA use through training and developing tools and methodologies, supporting gender-based policy research, and information dissemination. SWC and women's bureaux in several major ministries are key to this effort and also provide policy advice in specific areas.

Departmental/agency responsibilities for program design and delivery include continuous monitoring, consultations, and research to see if the program is meeting its objectives. In doing so, gender impacts are taken into account in a variety of ways:

Gender disaggregated data, though not universally available, are a regular feature of major income-related programs such as public pensions, student loans, employment insurance and tax-filer data.

Historical data from Statistics Canada, which provides information by gender on a regular, institutionalized basis (including gender relevant data – such as on unpaid work and violence against women – developed in consultation with Status of Women Canada) is widely available and used extensively for research.

Examples of data tools used include the production of a data guide and a selected set of Economic Gender Equality indicators. These indicators help provide a framework for assessing policy impacts on income, work, and learning, including tracking the positive gender equality effects of the personal income tax system.

Special reports on the gender impacts of various programs may be produced at times. For example, annual Employment Insurance monitoring reports with sex-disaggregated data indicated that some changes were needed to improve women's access to benefits. These changes were included in an economic and fiscal statement in the fall of 2000.

Departments themselves may commission or use research by actors outside government. SWC has particular funding programs to support the work of women's equality-seeking organizations and specific gender-based policy research.

Departmental officials, as well as Ministers, often meet with NGOs to discuss their concerns, priorities and points of view. For example, Status of Women Canada has often hosted conferences in which women's organizations were invited to discuss different policy and program issues. Ministers have also been invited to these events.

Ministers also make themselves available for an annual lobby day organized by the National Action Committee on the Status of Women, an umbrella organization for women's equality-seeking groups.

CZECH REPUBLIC

Gender analysis are not explicitly used in the budgetary process

DENMARK

Several procedures are in place to ensure equal representation of women in government committees, task forces and working parties etc. Also, there are rules and regulations regarding gender issues in personnel recruitment. An independent committee on gender equality has been set up to report on various gender issues. There are no formalized procedures in the budget process concerning gender issues. However, a new bill on gender equality requires central government organizations to develop procedures for including issues of gender in all aspects of their work. This will also include budgeting.

FINLAND

Information on gender analysis to budgeting is unfortunately not ready yet.

FRANCE

Il n'y a pas une approche systématique en ce domaine et, si des informations sont régulièrement diffusées sur des comparaisons entre la situation des hommes et des femmes en matière de taux de chômage, de niveau de rémunération ou d'accès aux postes de responsabilité, celles-ci n'ont pas jusqu'à présent d'impact direct dans la manière dont sont présentés les programmes ou les choix budgétaires.

Il convient néanmoins de souligner que le Gouvernement a mis en œuvre des dispositions destinées à lutter contre les discriminations dont pouvaient être victimes les femmes dans l'accès aux responsabilités (exemple de la mise en œuvre de la loi sur la parité des candidatures hommes-femmes lors des élections municipales de mars 2001), ou dans l'accès à certaines professions. Une déléguée aux droits des femmes a été mise en place auprès de la ministre de l'emploi et de la solidarité afin de suivre et d'encourager les évolutions qui vont dans le sens d'une parité entre hommes et femmes (sur le plan des salaires; de la législation du travail, de la féminisation des emplois ...). Dans cette lutte contre les discriminations, le Gouvernement s'appuie très largement sur un travail mené en commun avec des associations.

GREECE

Gender analysis is not applied to budgeting.

HUNGARY

There is no obligatory discussion on the gender aspect during the budgeting process, but political parties or MP-s occasionally focus on this issue. The Law on Public Finances does not identifies special reporting obligations concerning gender impact of government programmes, as there are no discrimination rules in the Hungarian legal system. Even the system of family allowances provides more and more gender-neutral benefits (that means the fathers may receive the child-care benefits instead of the mothers at their own discretion). Beside the statistical data there are no gender disaggregated ones available in the budget documentation.

The Minister of Social and Family Affairs is responsible for the coequality issues between women and men among other duties within the government. It maintains a modest program especially to support private initiation via competition (for example: to support media-products, family-friend employers providing models for good practices). In the recent years about 10 non-profit institutions engaged in women issues (women's societies and alliances) received lump-sum budget transfer by decision of the standing parliamentary Committee for Civil Organs. Among the long list of normative and discretionary government or social security transfers aimed family-, child- and women protection there are special items in the budget, like assuming the fees that have to be paid for the abortus in many cases, providing free of charge legal, medical, mental advises for those in need.

Within the government administration an Office for Women Issues was established in 1996 as a department of the Ministry of Labour as a result of the 4th World Conference of Women held in Beijing, September 1995, by the UNO. The Secretariat started to publish volumes of studies concerning the Action Programme in 12 critical areas identified in Beijing. Later the Office was reorganised and its name has changed as Secretariat for Representation of Women's Interest in the framework of the Ministry of Social and Family Affairs and the scope of the responsibilities has become wider, due to the establishment of the Council for Representation of Women's Interest in 1999. The Council consists of representatives of different areas of the public administration and representatives delegated by interest groups and institutions and independent experts as well. The role of the Council is identified as making comments on government programs and bills concerning the women's interest and monitoring the programs. The Secretariat has continued regular publishing studies and statistical publications. Two of the key studies from these series are "The changing role of Woman (Report on the situation of women in Hungary)", published in 1997 and the participation in the MONEE Project of UNICEF to elaborate a regional monitoring report "Women in the political and economical changes" in 1999, covering the transitional (former "socialist") countries. The Secretariat completed the IV. and V. Government Reports to the United Nations (CEDAW Report – Convention on Elimination of Discrimination Against Women) in 2000, including lots of information and statistical data covering 1991-99 years. 11 ministries, social security authorities and independent experts participated in compilation of the CEDAW Report.

In 2000, for the first time, the Secretariat supported by the Hungarian Statistical Office published a statistical pocket-book "Women and Men in Hungary" including all the important data related to gender issues.

For further information in English please find the web-page of the Secretariat within the Ministry of Social and Family Affairs: www.szcsm.gov.hu/main_cs.html

The Hungarian Parliament established a Subcommittee for Women's Rights belonging to the Standing Committee for Human Rights, Minority and Religious Affairs, to monitor the execution of the laws.

The latest legislative developments are the following: In June 2000 the Parliament approved a Law on Proclamation of ILO Agreement No 100 on the principle of the need of equal compensation of men and women for equal work. In Sept 2000 the Parliament announced Hungary's joining the Supplementary Protocol to CEDAW.

ICELAND

There is no gender analysis applied to the budget.

IRELAND

(Information on Ireland supplied by the Department of Justice, Equality and Law Reform)

The Irish budget in itself is not subject to gender analysis. However, all policies under the National Development Plan 2000 to 2006 are to promote equal opportunities between women and men, and gender mainstreaming is the strategy adopted to implement this. This involves a degree of gender impact analysis,

The National Development Plan (NDP) is a plan for the investment of over 50 billion euros in order to promote development in human resources, industry, infrastructure and regional development, and will be implemented over seven years. Seven per cent of the funding for the NDP is from the EU Structural and Cohesion Funds, while the remainder is provided by the Irish Exchequer (see www.ndp.ie for further information)

There are a number of specific requirements in the NDP to promote equal opportunities between women and men. These are:

- project selection criteria for measures funded under the Plan must have regard to the likely impact on gender;
- statistical indicators must, where possible, be gender disaggregated;
- there is a commitment to achieving gender balance on Monitoring Committees set up under the plan;
- Monitoring Committees must have a representative promoting equal opportunities;
- equal opportunities is to be a criterion in all evaluations carried out under the NDP; and
- an Equal Opportunities and Social Inclusion Co-ordinating Committee has been established to secure the maximum application of commitment on equal opportunities - particularly gender equality - and social inclusion across the NDP.

Earlier this year the Government adopted Gender Impact Assessment Guidelines as a further aid to mainstreaming (see www.irgov.ie/justice/Publications/EE/GIA%20guidelines.htm). These include a gender impact assessment form, which was completed by mainstream policy makers for most measures funded under the NDP. This form asks for information on the number of women and men likely to be affected by the expenditure, the factors which might lead to differences in the numbers of women and men affected, what actions could be taken to reduce these differences and the actions which will be taken in this regard.

A special Unit has been established within the Department of Justice, Equality and Law Reform to support all implementing Departments and delivery agencies in the NDP to meet the equal opportunity objective in their programmes, measures and initiatives. Funding of 5.36 million euros has been allocated from the NDP for this purpose.

This Unit, the NDP Gender Equality Unit provides an advisory, training and information service on issues relating to gender and the NDP and is developing the collection of gender-disaggregated statistics across the Plan. A databank of existing statistics has been collected and is available at www.irlgov.ie/justice/equality/gender. New data on women's and men's use of transport, and on their housing conditions has just been collected. Government departments, NGOs, local partnerships and academics have accessed the data on the web page.

A representative from the National Women's Council of Ireland (an NGO) is on the Management Committee of the Unit. The remit of the Unit includes supporting the Community and Voluntary sector. In 2000, two training sessions were run by the Unit to inform Social Partners in relation to the equal opportunities requirement in the NDP, and to help support them in their roles monitoring the implementation of the NDP and in some cases receiving funding from the NDP.

The Unit provides assistance to Departments in carrying out Gender Impact Assessment of policy proposals drawn up in the context of the NDP and has advised on the collection of indicators (statistics) measuring the equal opportunities objective.

ITALY

No response made to this question.

JAPAN

Availability of gender disaggregated data (i.e. separate information for women and men) for various government programs.

In Japan, gender disaggregated data for those statistics such as population, labor/wages, health, and education are accumulated.

Article 15 of the "Basic Law for a gender-equal Society" which was proclaimed and enforced in June 1999 states: "*The national and local authorities are to locate all measures which may be thought to have an effect on the development of a gender-equal society, and when enforcing those measures, are to consider the development of such a gender-equal society*".

A research group formed at the Prime minister's Office arranged some basic concepts on methods in December 2000, to research the effects related to gender equality, in making sure that all ministries and agencies commence a research on the effects related to gender equality. Research investigations on government policies, which have an effect on the development of gender-equal society, are continuously in progress at the Conference on Gender Equality in the Cabinet Office.

KOREA

No response made to this question.

LUXEMBOURG

No response made to this question.

MEXICO

No response made to this question.

NETHERLANDS

No response made to this question.

NEW ZEALAND

The current Cabinet Office circular on integration of gender analysis in public policy development is available as follows:

1. Cabinet has agreed that a gender implications statement will be required for all papers submitted to the Cabinet Social Equity Committee (SEQ), which would previously have been considered by the Cabinet Committee on Closing the Gaps. The focus of that committee was to assess how to reduce inequalities in the key areas of education, health, employment and housing. All papers going to SEQ which cover those issues should include a gender implications statement.
2. The purpose of the gender implications statement is to ensure that policy proposals include an assessment of the impact of proposed and existing policies and programmes on women and men, and whether they advantage or disadvantage women and men.
3. This circular replaces CO (00) 11. It outlines the objectives of the requirement for a gender implications statement and how departments should go about meeting them. It also provides guidance on the advice available from the Ministry of Women's Affairs on gender analysis.
4. Ministers' offices and chief executives should ensure that all staff involved in the preparation of submissions for SEQ are familiar with the advice in this circular.

What is Gender Analysis?

5. Gender analysis is a tool for decision-making. It is a method of examining systematically and consistently how gender differences are affected by government action, and communicating that information to decision-makers. Both the analysis and communication aspects are important. Completion of a gender implications statement will assist in assuring the government that new or amended policy proposals are subject to proper analysis and scrutiny as to their necessity, efficiency, and net impact on community welfare. This will enhance the government's ability to make informed decisions.
6. The quality of gender analysis will be limited by the availability of adequate sources of statistical information. It is anticipated that over time both the data available and the expertise to undertake the

analysis will improve. Where gender analysis is not possible, the reasons for this should be included in the paper.

Content of the Gender Implications Statement

7. The gender implications statement will report succinctly on whether gender analysis has been undertaken, and if it has not, why not, e.g. there may be no data available or a department may have no gender expertise. Where the gender implications of the policy proposal are significant, those findings and implications will be incorporated throughout the body of the proposal.
8. The statement may also include a summary of the findings of the analysis. Attached as [Annex A](#) (14 kB pdf) is a guideline providing 'Key Questions to Ask in Gender Analysis'. A gender implication statement could contain some or all of the comments described below. It may need to pay particular attention to the impacts on Maori and Pacific women and men:
 - A statement about how and to what extent the policy proposal will affect women and men, directly or indirectly.
 - A statement clarifying what the desired outcomes for women in this policy area are. Are they the same as for men, or do they need to be different?
 - A statement identifying options to address the issues, if any, for women and men. Will the impact of any of the options be different for women and men? If so, what is that difference? Is it acceptable? Is it unacceptable?
 - A statement about the Government's international and domestic legal obligations to women and men.
 - A statement confirming that a different approach needs to be taken to ensure that women and men learn about the policy change or service delivery change or about a new service.
 - A statement confirming that a monitoring system is in place to collect utilisation and outcomes data by gender and ethnicity.
 - A statement clarifying why gender analysis has not been undertaken if this is appropriate.

At What Stage Should the Gender Implications Statement be Prepared?

9. The department or agency responsible for the policy proposal should prepare the gender implications statement, following consultation with interested parties.

Which SEQ Papers Require a Gender Implications Statement?

10. A gender implications statement is required for all policy proposals to SEQ that would previously have been considered by the Cabinet Committee on Closing the Gaps. This will generally mean all papers dealing with education, health, housing, and employment issues. A statement will not be required if the proposal deals with administrative procedures within or between departments, and does not impact on business, consumers or the public.

Length of Gender Implications Statement

11. The gender implications statement should explain succinctly the key findings obtained from the gender analysis and the applicability of the findings to the policy proposal. The length of the statement will

depend largely on the complexity of the problem under consideration, the number of alternatives considered, and extent of costs and benefits.

12. As a general rule of thumb, the length of a statement should be one paragraph. The statement constitutes part of the 10-page limit prescribed for Cabinet papers. Where the gender implications of the policy proposal are significant, those findings and implications will be incorporated throughout the body of the proposal.

The Role of the Ministry of Women's Affairs

13. The Ministry of Women's Affairs will review the effectiveness of the gender implications statement.
14. The Ministry will continue to advise public service departments on how to integrate gender analysis into their policy development, including providing guidance to departments on how to decide on the nature and extent of analysis required for any particular policy issue. The Ministry will also provide one-on-one guidance, seminars and presentations, and will participate in officials groups. Public service departments are, however, ultimately responsible for incorporating gender analysis into their policy development.

NORWAY

No response made to this question.

PORTUGAL

No response made to this question.

SPAIN

No response made to this question.

SWEDEN

The Government has a collective responsibility for achieving gender policy objectives. Each minister is responsible for promoting a gender equality perspective in his/her policy area. The Minister for Gender Equality co-ordinates the work and is responsible for the follow-up and further development of the gender policy. The Division for Gender Equality, which comes under the Minister, has a pro-active, co-ordinating and advisory role in relation to the ministries. This means that the Ministry of Finance, as well as the other ministries, has a responsibility for promoting gender equality within their field of operation.

A prerequisite for gender analysis is the availability of gender disaggregated data. In 1994 the Government decided to issue an additional instruction to Statistics Sweden which states that all official statistics in Sweden shall be disaggregated by sex unless there are special reasons for not doing so. This has meant that most statistics today are available disaggregated by sex. However, the Government also strives to *present* data and information disaggregated by sex in its policy documents.

Considering the significance of the budget as the prime policy instrument of the government, it is important that gender analysis is made for all government policy areas (education, social affairs, employment etc.) and that the analysis is carried out by the ministries responsible for the policy area in question. The ministries are expected to set gender equality objectives and targets within their government programmes proposed in the budget bill. In addition, the Ministry of Finance makes a special report of the distribution of economic resources between women and men, presented every year in the Government's Budget Bill.

In the Spring Fiscal Policy Bill presented in April 2001 there is a description of how the policy measures proposed influence the income distribution for both women and men. It is shown that the policy measures are more favourable for women than for men.

This system is now being further developed and the Government will start a project which will look at how the gender equality perspective can be better reflected in the government's budget process. It is also planned to start a Nordic project on gender mainstreaming in the budget process. The aim is also to get a clearer picture of how and to what extent the different policy areas and programmes contribute to equality between women and men, which would improve possibilities to follow-up and evaluate results and efforts made to accomplish equality between women and men.

SWITZERLAND

A l'échelon fédéral : Le budget de la Confédération est avant tout un budget de transferts, qui n'offre que peu de possibilités de régulation des dépenses en fonction du sexe des bénéficiaires. Ainsi, il n'est souvent pas possible de savoir quel sera le bénéficiaire final d'une dépense obligatoire (mises à part les rentes de vieillesse, invalidité).

Une analyse par sexe existe pour ce qui est du personnel de la Confédération (part du personnel féminin, niveau du poste occupé, fluctuations).

Actuellement, le Parlement réexamine le système de sécurité sociale étatisé, pour ce qui est de l'assurance vieillesse et survivants. Les propositions de réforme vont dans le sens d'une plus grande égalité des conditions de retraite entre hommes et femmes et des rentes de veuf/veuve. Ainsi, l'âge de la retraite des femmes pourrait être relevé à 65 ans, ainsi que cela est déjà le cas pour les hommes. De même, la rente de veuve serait réduite afin d'être alignée sur la rente de veuf. Les propositions qui seront adoptées par le Parlement devront vraisemblablement être soumises au vote populaire.

TURKEY

No response made to this question.

UNITED KINGDOM

Response to this question will be provided later.

UNITED STATES

Discussion in the budget documentation of the gender impact of various government programmes:

There is no systematic effort made to discuss programs in terms of their gender impact, unless a program targets a certain gender. No data on programs that target men has been collected, as far as we know. Information has, from time to time, been collected on programs that target women, e.g., breast cancer research, contracting opportunities for firms owned by women, equal pay initiatives.

- Separate special reports on the gender impact of various government programmes: Such reports do not exist in any systematic manner.
- Availability of gender disaggregated data (*i.e.* separate information for women and men) for various government programmes: Such data does not exist in any systematic manner.
- Co-operation with non-governmental organisations on analysing the gender impact of various government programmes: There is no such systematic cooperation.
- The use of historical data on gender impact when reforming existing government programmes or formulating new ones: There is no use of historical data in any systematic manner..
- Respective roles of the finance ministry, spending ministries, others (women's bureaus, etc.) in preparing and using this data.: Not applicable.
- The legislature's consideration of gender impacts when deliberating various government programmes: We do not have any evidence that the legislature considers such information in a systematic or routine manner.