

La promoción de los Presupuestos sensibles al Género en Escocia

**La experiencia del Grupo de presupuestos de
las mujeres de Escocia (SWBG-Scottish
Women's Budget Group)**

Conferencia sobre:
Economía y Presupuesto responsable de Género

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Escocia

Antecedentes

- "Devolución" - Julio 1999
- El Grupo Directivo Consultivo (CSG) y la Ley escocesa de 1998 - 'de la gente y para la gente'
- Parlamento escocés - Igualdad de Oportunidades como principio fundamental y como compromiso para una gobernanza transparente y de consenso
- Agenda de Transversalidad - "el objetivo debe ser integrar en el proceso de la formulación de política y en el trabajo del Parlamento, los principios y compromisos para promover la igualdad de oportunidades para todas las personas y para eliminar los efectos de la anterior discriminación" (CSG, 1998)
- El Comité de Igualdad de Oportunidades del Parlamento y la Unidad de Igualdad del Ejecutivo



¿Las mujeres marcan las diferencias en Escocia?

- Las mujeres en la campaña de pro-devolución
- Mujeres en el Parlamento
- La " forma" de las nuevas instituciones
- Parlamento escocés - compromiso por la gobernanza transparente y consultiva
- Agenda de Transversalidad - "el objetivo debe ser integrar en el proceso de la formulación de política y la manera en la que el Parlamento trabaja, los principios y compromiso para promover la igualdad de oportunidades para todas las personas y para eliminar los efectos de la anterior discriminación" (CSG, 1998)
- El Comité de Igualdad de Oportunidades del Parlamento y la Unidad de Igualdad del Ejecutivo
- "Hablar" sobre género en un entorno político más "amable con respecto al género"



The May 1997 UK election victory of New Labour meant that devolution, the transfer of power from the UK Parliament at Westminster, now seemed likely to become a political reality. A referendum was held on 11 September 1979 on the government's proposals for a Scottish parliament and the Scottish electorate produced a clear majority in favour. The first Parliament took up its full legislative powers in July 1999.

The women's movement in Scotland recognised the potential opportunities offered by a devolved government, directly responsible for a number of policy areas, to promote issues relating to gender equality and subsequently engaged positively with the pro-devolution campaigns. Many of these women were committed feminists who were also well placed because of their senior positions in public bodies, universities, trade unions, and other aspects of public life, to access senior politicians and decision-makers. The activities of the women's movement proved to be instrumental in shaping the new institutions with specific respect to the Scottish public policy making process. The blueprint for the new Parliament recommended adopting a model of governance where the concepts of sharing power, accountability, access, participation and equal opportunities would be paramount. The priority given to the promotion of equal opportunities can be directly attributed to the influence of both individual women and organisations representing Scottish women working together to secure a gender sensitive political environment in the 'new' Scotland.

The favourable policy framework implied by a commitment to mainstreaming combined with the increased presence of women in the new Parliament indicates real potential for promoting gender equality throughout the policy process and across the range of public policy interventions. Thus women in the 'new' Scotland are more visible at an institutional level, have more influence and have been very successful in engaging with both the structures and processes

¿Qué tipo de diferencia?

- Mas visible en el nivel institucional -

Mujeres más "visibles" - 39.5% MSPs; más consultas - Forum Consultivo de Mujeres en Escocia (1998-2003), Convención de Mujeres Escocesas (2003-?).

- ¿Ha supuesto esto una diferencia para la vida diaria de las mujeres?

- Proceso político
- Grupo de Presupuesto de Mujeres Escocesas (Scottish Women's Budget Group) - éxitos/fracasos



Grupo de Presupuestos de Mujeres Escocesas

- Establecido Mayo 2000
- Miembros de diferentes organizaciones - académica, sindicatos, organizaciones estatales y voluntarias y comunidades locales
- !!!Recursos limitados!!!
- !!!Actividades ilimitadas!!! - Dar respuesta a los documentos de presupuesto, peticiones para dar pruebas a los Comités, respondiendo a la política, documentos consultivos, concienciar, dar formación



Established in May 2000, SWBG is a campaigning, information and research organisation set up to ensure that gender-impact analysis is embedded within the Scottish public-policy process. Although the work of the group has been, and continues to be firmly focused on actual patterns of public expenditure and associated processes, they have engaged with the new Scottish institutional framework at a range of levels. This has involved directing their activities primarily at Finance Ministers, the Finance Committee of the Parliament and officials in the Finance Department of the Scottish Government, as well as making the case for gender budgeting to various government ministers, parliamentarians, and government officials from across a range of policy-related departments. The group has promoted the case that the budget reflects the social and economic priorities of a government and represents the spending needed to put policy into practice. Claims of 'gender neutrality' with reference to the budget fail to reflect adequately how spending decisions have differential impacts on men and women, boys and girls. The practices and processes associated with drawing up the budget do not normally account for how the lives of girls and women differ as compared with boys and men. Thus 'gender neutral' can more accurately be described as 'gender blind'. In their numerous responses to the Scottish Government's budget, SWBG have continually pointed out how the different needs and resources available to men and women will affect the way they access everything from jobs, to public services such as housing, transport, education and training. By taking account of these differences, policy-makers can ensure better policy targeting, more effective delivery and greater equality.

Principios de la Gobernanza

- Transparencia
- Participación
- Sostenibilidad
- Estrategia de largo alcance
- Apropiación por parte del país



Although international experience has not produced a simple and uniform model for application in the production of gender sensitive budgets, lessons have been learned and a number of crucial ingredients have been identified. In considering how best to proceed with adapting and applying the range of tools and methods developed a number of governing principles should direct any future course of action:

Transparency - In embarking upon a programme of reform aimed at developing a more gender aware approach to the national budget it is vital that greater transparency of, and accountability for budget processes, becomes an established feature of the political process.

Participation - Equally important is a commitment to engage in more participatory methods of governance and initiatives should encourage as wide a range of views as possible, specifically including the views of those whose needs are often neglected in the policy design, implementation and evaluation process.

Sustainability - The development and application of gender budgeting tools (such as gender impact analysis, gender disaggregated expenditure analysis, etc) should build on existing budgetary mechanisms to ensure sustainability. A necessary first step in the process would be to establish how the budget is prepared and presented

Long Term Strategy - The programme of reform should be viewed in the longer term with review mechanisms set in place to ensure continuous improvement.

Comprender el Proceso de Presupuesto

- Primer paso en Escocia
- Clave en la creación de capacidades
- Dinámica del proceso presupuestario
- Papel de los Comités Parlamentarios
- Identificar ambos, fases clave y actores clave
- Relevancia del Departamento de Hacienda



Tracing developments in Scotland following devolution will highlight the significant progress made to date in promoting a more gender sensitive approach to the budget process. However, with reference to the governing principles, outlined above, there is still a lot to be achieved. The Scottish story is worth telling in that whilst advances can be noted in terms of increased transparency and participation, which will hopefully be sustainable in the long term, the practice remains far removed from the theory. That is, the commitment to ‘gender proof’ the budget in Scotland has been continually publicly stated but policies remain on the whole ‘gender blind’.

In developing a gender sensitive approach to budgeting one of the first steps is to gain an understanding of the actual budget process. This involves identifying the key actors, the relevant stakeholders and any potential access points. This was considered crucial within a Scottish context given the recent changes in the political and economic environment. Following devolution then, the process of drawing up the annual budget in Scotland was therefore novel to all concerned. For SWBG then an identified crucial first stage in promoting gender sensitive budgeting in the ‘new’ Scotland was to specifically secure funding to engage in research which mapped the first annual budget process and to disseminate the results of the research as widely as possible. This would serve to build capacity around issues relating to understanding the budget and would effectively promote the goal of ensuring transparency within the context of budgetary processes and decisions regarding the allocation of public resources. This activity has proved invaluable for SWBG and the actual research output can be identified as a **tool** in progressing with their agenda in Scotland. Furthermore, one of the important lessons learned from this exercise is the difficulty associated with ensuring transparency given the political nature of the budget. However, developing an awareness of the actual process and keeping up to date with the dynamics of the process is crucial for those working towards gender sensitive budgeting in any country.

¿Una iniciativa escocesa de Presupuesto con enfoque de género?

- No hay ejemplos de cambios actuales de política
- El presupuesto actual permanece ciego al género! - mujeres jugando al golf???
- Igualdad de género vs "cerrar la brecha de oportunidad"

Sin embargo

- Una mayor transparencia - "¿Entender el proceso de presupuesto"?
- Una mayor participación - forjando nuevos partenariados
- Contenido en la Estrategia de Igualdad del Gobierno Escocés (Nov 2000) un compromiso para:
'evaluar el impacto sobre la igualdad de los planes de gasto y de las decisiones como parte de la agenda de transversalidad'
- Proyectos Piloto en Salud y Deporte - recogido en los documentos de Presupuesto 2006/07
- Comité de Igualdad de Oportunidades desde from 2007



In their commentary on the Budget for 2006-7, SWBG drew attention to the practice of presenting policy initiatives targeted at promoting equality in conjunction with the theme of 'Closing the Opportunity Gap'. For SWBG, this 'suggests the policy and resource interventions to address the complex gamut of the structural causes of gender inequality stem from/are underpinned by a singular focus on poverty reduction [and] this position is not in keeping with an overall mainstreaming agenda' (SWBG 2005: 2)

However progress can be identified. In addition to greater transparency and participation a key indicator of progress is the the establishment of the Equality Proofing Budgets Advisory Group (EPBAG) in 2000. (I will say more on this later) One of the first tasks of the group was to undertake some pilot research in health and sport. The pilot studies were considered to be a useful approach to identifying practical ways of assessing the equality impact of budgets and spending plans. However, the work to develop the means of making the link between policy and process did not happen in earnest until 2005. Over the period from January to September 2005, academic researchers, expert advisers and government officials from the Finance Department, the Equality Unit and the respective spending agencies worked in collaboration to complete the pilots with the aim of feeding into the preparations for the next multi-year spending review. The collaboration involved establishing an evidence base with regard to gender-based inequalities, in particular policy areas within the health and sport budgets, mapping the policy and budget process and establishing both formal and informal links within these two policy areas, and the use of available technical expertise in the field of gender budgeting. Although the delay in making tangible progress was a cause for some frustration for SWBG, the group nonetheless welcomed the inclusion in the Draft Budget 2006-7 of an update on the pilot work. The introduction to the Draft Budget emphasised that the pilot work will 'track the process of policy formulation and resource allocation with respect to these two

Progreso

- **Transparencia**
Comprender el Proceso Presupuestario Escocés
- **Participación**
Grupo Asesor de Igualdad en los Presupuestos , Sistema de Comité y Consulta Parlamentaria
- **Sostenibilidad**
Transversalizar proyectos piloto y Reforma Presupuestaria
- **Estrategia a largo plazo**
Centrado en el proceso más que en los cambios políticos
- **Apropiación por parte del país**
Proyectos pilotos de Salud y Deporte; Moderno estudio de aprendizaje



The Scottish budget process involves three main stages: the setting of priorities and expenditure strategy; the presentation of detailed expenditure proposals in the publication of the draft budget; and the enactment of the budget bill. The Scottish Parliament has the power to vary the standard rate of income tax, but the current administration has chosen not to use this power. Therefore the focus of SWBG is on the public spending allocation process in Scotland.

This process is designed to promote transparent annual budgeting and to accommodate the enhanced scrutiny role of the Parliament. Following their initial written response to the first round of spending proposals, members of SWBG were invited to a meeting with the Minister of Finance. A key outcome from this meeting was agreement on behalf of the Scottish Executive to establish an advisory group that would act to raise awareness and to develop understanding of equality proofing budgets both within the Executive and throughout the wider policy making community in Scotland. The Equality Proofing Budgets Advisory Group (EPBAG) was set up in October 2000 and SWBG are formally represented on this group.

Lobbying by SWBG and other groups has contributed to improvements in the presentation of budget documents. These now set more specific objectives and targets. Representation on the Equality Proofing Budgets Advisory Group, combined with the workings of the Parliamentary committee system, continue to afford SWBG the opportunity to influence the budget process.

The Finance Committee holds a potentially key role in equality proofing the Budget. The Finance Committee issue guidance to the subject committees on scrutinising the budget. The various subject committees submit their reports on

Obstáculos

- **Transparencia**
Dinámica del proceso presupuestario y responsabilidad
Principios de Igualdad- 'invisible' o en cierta forma subsumido

"En cualquier caso, ahora, todo es mainstreaming."
- **Participación**
Capacidad del SWBG
- **Sostenibilidad**
Comprensión (o falta de él) de género como concepto
Cambio de gobierno y "momento perdido"
- **Estrategia de largo alcance**
!En el largo plazo estaremos todos muertos!
- **Apropiación por parte del país**
Es difícil de cuantificar



There remains a long way to go before Scotland makes the link between a commitment to gender equality and the process by which resources are allocated to meet such a goal. In making progress in this regard, a staged approach is important, involving: research and awareness raising; building capacity to conduct gender-budget analysis through pilot work and ensuring relevance to the Scottish context; and disseminating and promoting the approach to the wider public. In Scotland first steps have been taken in relation to the first two stages. However, the pace of change to date represents only slow and faltering progress towards gender sensitive budgeting. Although recognised as an ambitious goal involving a long term strategic approach, caution needs to be exercised in using such as an excuse for lack of progress. As John Maynard Keynes is so famously quoted: 'In the long run we're all dead.'

Frustraciones

- Papel/Función del SWBG
- Proceso vs política
- Ajustes presupuestarios - Valor del dinero!
- 'Cerrar la brecha de oportunidades'
Igualdad y transversalidad de género perdidas en una agenda más amplia de justicia social
- Foco actual en el 'crecimiento económico sostenible'
- ¿Un plan de recuperación con enfoque de género?



Thus there has been significant progress in working towards gender sensitive budgeting in Scotland. Transparency in the budget process has been enhanced in that there is a greater understanding amongst key stakeholders of the actual mechanisms and stages involved in drawing up the annual spending plans, there is a formal working relationship with the Government via the Advisory Group and there is a formal commitment contained within the Equality Strategy to assess spending plans with specific reference to gender.

However, despite such positive developments in the past eight years, there has been no evidence of actual policy shifts to promote gender equality and the budget itself remains gender neutral. Although there is implicit recognition, both on behalf of the Government and SWBG, that in practice gender proofing the Scottish budget is part of a long term process, and thus incremental change is welcomed as necessary in working towards the longer term goal, the lack of significant shifts in policy is proving frustrating. The almost exclusive focus on process is resulting in less obvious outputs and it is therefore becoming more difficult to maintain the enthusiasm of those most directly involved in promoting gender sensitive budgeting in Scotland. For SWBG this has led to significant barriers in progressing with their work.

¿Más frustraciones?

- ¿Analogía con la lista de la compra?
- ¿Puntos de acceso?
- Capacidad del Grupo de Presupuestos de Mujeres Escocesas (SWBG)

PERO

- ¿Percepciones sobre nosotros/as mismas?
- Punto de interés centrado en Educación Económica



Shopping List - we have the commitment, institutional framework and policies in Scotland. That is, someone has gone to the bother of thinking about it and actually writing the shopping list but no-one is doing the shopping and when they do it's the wrong person (I.e forgets half the stuff on the list or reinterprets the list)

Access Points - how meaningful is the consultation process and when should it happen? Need to engage more effectively with the Parliamentary Committees - has been increasingly important in determining progress for SWBG

Membership – this is a big issue. Where do we have meetings, how often and what is the focus. Need to diary dates around the budget and do the rest remotely. Less academic and more focused on lobbying but this causes tensions when considering our role in working with the Government on the pilots? How do we resolve this?

The perceptions of SWBG though are enlightening:

this strategy of persistence and repeatedly stating one's case may be perceived by public officials and politicians as indicative of a formidable lobby that '*is not going to go away.*' Evidence to date points to the relative success of the group's lobbying strategy within political, bureaucratic and resource constraints but at a high cost in terms of their relative capacity