

Gender Budgeting in Europe

“Everyone is in favour of achieving gender equality, but few are aware of how to achieve it. This ground-breaking collection explains the emancipatory potential of Gender Budgeting, as well as detailing its history, development and experience of implementation in different European countries. It argues that GB can move beyond a technical analysis of specific public expenditure programmes or tax instruments and engage with macroeconomic policies to achieve new approaches to policy which offer truly emancipatory and inclusive economic models for Europe. A must read for all who share this ambition.”

—Ruth Pearson, *Emeritus Professor,
University of Leeds, UK*

“In the uphill battle for gender equality, gender budgeting is probably the most important and effective instrument policy makers have at hand. Accordingly, initiatives to implement gender budgeting are strongly supported and even urged by the OECD, as well as the IMF and the European Commission. Success is crucially dependent on the commitment of parliaments and governments, but also requires the active involvement of civil society. The in-depth elaboration of this point, based on eight detailed country studies, makes the book an invaluable companion for anyone striving for progress in the practical implementation of gender budgeting.”

—Margit Schratzenstaller-Altzinger,
*Austrian Institute of Economic Research,
Vienna, Austria*

“This book is essential reading for everyone—policy makers, activists and academics—intent on tackling the economic dimension of gender inequality. Everything you need to know about the transformative potential of gender budgeting is in this book.”

—Professor Claire Annesley, *Deputy Pro Vice Chancellor,
Equalities and Diversity, Head of Politics,
University of Sussex, UK*

“Gender budgeting has evolved from a radical “contested concept” to part of the policy toolkit for modern governance and inclusive growth. This important work demonstrates how gender budgeting has been put into practice in Europe, and explores how the concept can remain true to its feminist aspirations. One key insight, of relevance both to national practitioners and international standard-setters, is the need for a broader conception of the ‘budget’ to encompass citizens and advocates as active participants in policy design and debate.”

—Ronnie Downes, *Deputy Head—Budgeting & Public Expenditures Division, OECD*

Angela O'Hagan • Elisabeth Klatzer
Editors

Gender Budgeting in Europe

Developments and Challenges

palgrave
macmillan

Editors

Angela O'Hagan
Glasgow Caledonian University
Glasgow, UK

Elisabeth Klatzer
Independent researcher-activist and
international consultant
Feminist Economics and Gender Responsive
Budgeting
Vienna, Austria

ISBN 978-3-319-64890-3 ISBN 978-3-319-64891-0 (eBook)
<https://doi.org/10.1007/978-3-319-64891-0>

Library of Congress Control Number: 2017963369

© The Editor(s) (if applicable) and The Author(s) 2018

This work is subject to copyright. All rights are solely and exclusively licensed by the Publisher, whether the whole or part of the material is concerned, specifically the rights of translation, reprinting, reuse of illustrations, recitation, broadcasting, reproduction on microfilms or in any other physical way, and transmission or information storage and retrieval, electronic adaptation, computer software, or by similar or dissimilar methodology now known or hereafter developed.

The use of general descriptive names, registered names, trademarks, service marks, etc. in this publication does not imply, even in the absence of a specific statement, that such names are exempt from the relevant protective laws and regulations and therefore free for general use.

The publisher, the authors and the editors are safe to assume that the advice and information in this book are believed to be true and accurate at the date of publication. Neither the publisher nor the authors or the editors give a warranty, express or implied, with respect to the material contained herein or for any errors or omissions that may have been made. The publisher remains neutral with regard to jurisdictional claims in published maps and institutional affiliations.

Cover credit: Ikon Images / Alamy Stock Photo

Printed on acid-free paper

This Palgrave Macmillan imprint is published by Springer Nature
The registered company is Springer International Publishing AG
The registered company address is: Gewerbestrasse 11, 6330 Cham, Switzerland

*From Angela – for Ian and Beth
From Elisabeth – for Lea and Elias
To all our feminist friends, past and present, around the world
who give us inspiration and support*

Preface

Gender budgeting (GB) is now part of the mainstream, advocated by the OECD and the IMF and on the agenda at the 2017 meeting of the G7 group of the world's richest countries. But what exactly is GB, and can it advance the cause of gender equality when faced with the austerity policies that are prevalent in much of Europe? This book engages with these questions on both the theoretical and practical levels, providing original conceptual analysis and diverse empirical case studies. GB aims to ensure that government budgets support the achievement of gender equality, and this book shows that GB has been adopted to some extent in countries in all parts of Europe, by national, regional, or city governments. However, there is a wide variety in the tools and procedures used; the extent to which the revenue side of the budget is covered as well as the expenditure side; and the types of gender inequality that are addressed. This book provides a critical reflection on these diverse experiences.

The book breaks new ground in setting GB in the context of the politics of budgets: What creates the political conditions for introduction of GB? What shapes the form that GB takes and what are its aims? What institutional resistances are encountered? To what extent does GB transform budget procedures and provoke rethinking about how revenue is raised and spent? Is it really a feminist policy change or merely the co-option of GB tools in the service of reforms of public finance that have much more limited goals?

The book also engages with an economic context, identifying the austerity policies that have been adopted since 2010 in many parts of Europe as the biggest challenge facing GB: these policies have resulted in cuts to many of the public services that are so important for gender equality. Is GB as it is currently practised equipped to deal with this challenge? The book argues that GB needs to move beyond a focus on specific public expenditure programmes or tax instruments and engage with macroeconomic policies to be able to better contribute to alternative and emancipatory ways to reshape the economies of Europe. This means challenging the idea that macroeconomic policy is a gender-neutral, technical process; and challenging EU economic governance rules, as well as the policies of national governments.

This book does not lose sight of the ultimate goal of using public finance to not only reduce gender gaps but also improve the well-being of women; nor does it dismiss steps forward as failures because the ultimate goal has not been achieved. Instead, it advocates strategies for securing improvements. It situates government budgets as sites of political struggle in which GB may be a useful strategy for achieving feminist policy change, but is clear-sighted about the obstacles to this. The book should be read by both those who are enthusiastic about the potential of GB for progressing gender equality and those who are sceptical. Both will find thought-provoking arguments and a rich store of empirical examples.

Colchester, UK

Diane Elson

Acknowledgements

This book has its origins in feminist scholarship and solidarity with members of the European Gender Budgeting Network who both appear in the final volume and who have willed it on from the sidelines.

The contributors have demonstrated extensive goodwill towards the project and to us as editors, as well as enduring good humour as deadlines and revisions were pushed hard. We are very grateful to all the authors named here and to the other contributors whose experiences and work we have drawn upon. These include Nicole Farnsworth, Birgit Erbe, Mara Kuhl, Begoña San José, Ana Elomaki, who contributed comments from which we have extracted content in Chap. 15, as well as the additional content from the hard-pressed chapter authors.

We are indebted to Vienna Chamber of Labour, Austria, for the support in writing this book from the research cooperation fund “Netzwerk Wissenschaft” that made possible the writers’ workshop in Vienna in 2016. Our thanks to the institution and to Christa Schlager for making it happen.

As editors, it was a significant challenge to take on so many contributors, with so many languages and perspectives. Such an approach was entirely consistent with what we believe should be feminist praxis and the sharing of knowledge. Working across so many perspectives and languages is both a privilege and awe-inspiring, and we are very grateful to all our contributors for working in English throughout.

Particular thanks must go to Morag Gillespie, who has allowed us to test the boundaries of friendship and common cause in feminist solidarity by acting as language and content proofreader. Her comments and common sense have been enormously helpful and kept us grounded.

At Palgrave, Thomas Coughlan has been a patient and supportive guide through the process, and we record our thanks to Aimee Dibbens for making the first approach and to Anna Reeve for picking up the project and Rachel Sangster for seeing it to completion.

In the early days of the EGBN, Ailsa McKay, our friend and colleague, was a significant influence on the formation and development of the network. Ideas and discussions with Ailsa always included lots of laughs, but also the consideration of a book on gender budgeting. Well, we made it, Ailsa!

We are very grateful to Diane Elson for her support and encouragement with this project and for agreeing to write the foreword.

We acknowledge the work of so many unnamed individuals inside and outside government institutions and in feminist organisations who daily strive to advance women's economic, political, and social autonomy and progress women's status in the world. This is part of our contribution.

Contents

Part I Overview of Gender Budgeting: Conceptual Underpinnings and Contestations	1
1 Introducing Gender Budgeting in Europe <i>Angela O'Hagan and Elisabeth Klatzer</i>	3
2 Conceptual and Institutional Origins of Gender Budgeting <i>Angela O'Hagan</i>	19
3 A Brief Overview of Gender Budgeting in Europe <i>Elisabeth Klatzer, Angela O'Hagan, and Katharina Mader</i>	43
4 Challenges of Austerity and Retrenchment of Gender Equality <i>Tindara Addabbo, Elisabeth Klatzer, Christa Schlager, Paola Villa, and Paloma de Villota</i>	57

Part II	Gender Budget Analysis and Methods	87
5	Gender Equality Impact Assessment: A Core Element of Gender Budgeting	89
	<i>Susan Himmelweit</i>	
6	Developments in Practice: Methodologies and Approaches to Gender Budgeting	109
	<i>Elisabeth Klatzer, Tindara Addabbo, Gloria Alarcon-García, and Angela O'Hagan</i>	
Part III	Critical Challenges	135
7	The Case of Austria: Reflections on Strengthening the Potential of Gender Budgeting for Substantial Change	137
	<i>Elisabeth Klatzer, Romana Brait, and Christa Schlager</i>	
8	Gender Budgeting in Germany Between Two Extremes: Excellent Practice and Outstanding Resistance	159
	<i>Christine Färber</i>	
9	Gender Budgeting in Iceland	179
	<i>Finnborg S. Steinþórsdóttir, Katrín Anna Guðmundsdóttir, Thamar M. Heijstra, and Halldóra Friðjónsdóttir</i>	
10	Gender Budgeting in Italy: A Laboratory for Alternative Methodologies?	199
	<i>Francesca Bettio and Annalisa Rosselli</i>	
11	Lessons from Gender Budgeting Experiences in Spain	221
	<i>Yolanda Jubeto, María José Gualda, Buenaventura Aguilera, Alicia Del Olmo, Paula Cirujano, and Paloma de Villota</i>	

12	Transconceptualisation of Gender Budgeting Ideas in the Polish Context	247
	<i>Zofia Łapniewska</i>	
13	Sustainability of Gender Budgeting in Local Administrations in Turkey: An Assessment from the Well-Being Perspective	271
	<i>Yelda Yucel and Gulay Gunluk-Senesen</i>	
14	Gender Budgeting in the UK: Devolution, Divergence and Feminist Tenacity	293
	<i>Angela O'Hagan, Eva Neizert, and Lynn Carvill</i>	
Part IV	Reflections and Challenges	317
15	Gender Budgeting as Feminist Policy Change: Feminist Advocacy and Alliances	319
	<i>Angela O'Hagan and Elisabeth Klatzer</i>	
16	Reflections on the Politics and Context of Gender Budgets: A Feminist Perspective	345
	<i>Antonella Picchio</i>	
17	Gender Budgeting in Europe: Overcoming Challenges and Advancing Transformation	361
	<i>Angela O'Hagan and Elisabeth Klatzer</i>	
Index		373

List of Figures

Fig. 2.1	Framework of favourable conditions for gender budgeting	35
Fig. 11.1	Gender budgeting strategy in Andalusia	233
Fig. 14.1	2010–20 cumulative individual impact of changes in taxes and benefits (percentage of net individual income per annum by 2020) by household income groups, gender and ethnicity (selected) (Source: UK WBG 2017c)	300

List of Tables

Table 2.1	Elson's tools of gender budgeting	24
Table 6.1	Gender budgeting approaches and methods	112
Table 12.1	Important capabilities	257
Table 12.2	Selected gendered outcomes of the research in the three areas of analysis	261
Table 13.1	An example for municipality budget—women's capabilities expenditure reclassification: Nevşehir (2013–2016) (000 TL)	280
Table 13.2	Comparison of women's capabilities-related expenditures in municipality budgets (2013–2016) (as % of total budget)	283