

Ailsa McKay
GB Scotland Dec 2004

***Developing a Gender Budget Initiative
A Question of Process or Policy?
Lessons Learned from the Scottish Experience***

***Chapter prepared for Vol 4 of University of Linz, Gender Studies
series.
December 2004***

**Ailsa McKay
Glasgow Caledonian University
Glasgow, Scotland
and
Scottish Womens Budget Group¹**

1. Introduction

¹ To become involved in the Scottish Women's Budget Group or to obtain more information about its work please contact Ailsa McKay, Division of Economics and Enterprise, Glasgow Caledonian University, Cowcaddens Road, Glasgow, G4 OBA, Scotland. Tel: 0141 331 3321 Fax: 0141 331 3293, e-mail: amk@gcal.ac.uk

The practical application of gender budgeting raises questions regarding the appropriate focus – should it be on policy related issues or should it be on the actual budgetary process. There is no right answer to this question but lessons can be learned from examining relevant country case studies. The purpose of this chapter is to outline current initiatives in Scotland, where there has been an almost exclusive focus on the ‘process’. Whilst this has led to a number of significant positive developments in promoting a gender sensitive approach to budgeting in Scotland, evidence of persistent gender inequalities across a range of both social and economic indicators is a continual cause for concern. In Scotland then, the apparent lack of developments in actual policy areas is proving frustrating. However, it is argued that attempts to deliver on gender equality in terms of actual policy shifts will not be sustainable in the longer term if equal attention is not paid to the way in which things are done. That is, the policy process itself is key in developing an understanding of the nature of gender inequalities and thus should remain a central focus in any attempt at promoting gender sensitive budgeting.

2. Why the Budget? – Making Gender Relevant

In exploring the concept of gender sensitive budgets one of the initial questions often raised is ‘why the budget’? That is, those committed to promoting gender equality within a mainstreaming agenda may not necessarily perceive the ‘budget’ to be the most appropriate stage of the policy process to consider gender impact. Rather, given that steps should be taken to ensure that gender concerns are an integral feature of the policy process it is assumed that the most appropriate point to initiate gender impact analysis would be at the policy design stage. Embarking upon a gender budget initiative then, initially involves developing an understanding of the relationship between policy and the actual allocation of public monies and to locate the budget within the policy process as opposed to viewing the two as distinct. This involves engaging effectively will all relevant stakeholders in debates focused on ‘why does gender matter in public spending’ and subsequently making the case for gender budgeting.

The national budget is effectively a public statement of a government’s political and economic priorities. Given the starting point of finite resources and competing demands, the process of drawing up the budget is essentially a political exercise whereby resource allocations are determined by politicians’ perceptions of need and preferences in their

respective constituencies. Failing to account for gender in this process, due to a lack of understanding of the social and economic nature of gender related differences combined with the absence of relevant gender disaggregated data, implies that budgets are 'gender blind'. This blindness is often presented as 'gender neutrality' in that the nature and level of budgetary allocations do not normally depend upon whether they apply to men or women. However, the impact of patterns of public expenditure is a gendered concept, therefore steps should be taken to ensure that the focus on 'neutrality' (or even the avoidance of discriminatory practices) should not allow policy to be 'gender blind'.

Gender divisions lead to different socially determined responsibilities and role expectations with consequences in terms of men and women being faced with different sets of constraints and value structures. Women therefore are affected by and respond to public policy interventions in different ways from men. For Himmelweit this is key in demonstrating the relevance of gender throughout the policy process and, in particular, in arguing how 'gender matters to efficiency';

...men and women are systematically differently placed in the economy, so that they face different constraints, assume different socially determined responsibilities, and consequently are likely to behave differently in response to policy. If this is true the differential gender impact of policy is not fortuitous but structural and the underlying causes of such gender differences have to be taken into account in all policy making.

(2002:51)

Gender neutrality can thus not be assumed with reference to the budget but rather gender bias should be made transparent and where appropriate, action taken to redress such. If government commitments to promoting gender equality are to be meaningful gender blindness in the allocation of resources must be replaced with gender sensitive approaches.

However, the actual budget is often considered distinct from the policy process in that it is presented as a financial statement indicating where and how monies across the whole range of government activities are spent. Adopting a gender sensitive approach in drawing up the budget would involve assessing all spending allocations with specific

Ailsa McKay
GB Scotland Dec 2004

reference to policy outcomes. The process of 'following the money' through to funded programmes or policies shifts the focus from the financial commitment aspect to the actual 'implementation or the practice of national policy statements' (Sharpe & Broomhill, 2002:26). Gender sensitive budgeting therefore serves to make explicit the link between policy and spending allocations across all government activity.

An additional key point to make in arguing for gender aware budgeting relates to the fact that gender 'responsive' budgets are often perceived in terms of a separate budget for women. It is crucial that all relevant stakeholders understand that the production of gender sensitive budgets implies that an analysis of the government budget has been undertaken to establish the budget's differential impact on *women and men*. According to Elson;

a gender budget initiative does not aim to produce a separate budget for women, or to increase the amount of money spent on women-specific programmes. Instead it aims to analyse any form of public expenditure, or method of raising public money, from a gender perspective, identifying the implications and impacts for women and girls as compared to men and boys. The starting point is that the implications and impact are likely to differ because of the different social and economic positioning of males and females.

(2000)

Thus, gender sensitive budgets are not 'women's budgets' but rather are a way of ensuring that ensuring that gender issues are integrated into all national policies, plans and programs. Understanding the concept in these terms allows for clear links to be made with an overall gender mainstreaming strategy. Making this connection has been key in developing a gender aware approach to budgeting within a Scottish public policy context.

3. Gender Budget Initiatives and Gender Mainstreaming

In advancing a programme of mainstreaming equality across the policy process, gender impact analysis of budget systems and spending proposals proves a useful and effective tool. Accounting for gender in the allocation and distribution of public resources leads to more effective targeting and improvements in service delivery. This implies efficiency gains across a range of public policy interventions in addition to promoting the goal of

gender equality. Although the annual budget statement presents as the immediate focus, assessing such with reference to any possible differential gender impacts will ultimately feed through into policy design, making explicit the link between policy choices and actual spending allocations. Thus the production of a gender sensitive budget involves undertaking gender impact analysis at all stages of the policy process. The practice of assessing budgetary allocations with reference to gender, however, should not be viewed as a stand-alone measure but rather a crucial feature of any successful mainstreaming strategy.

The budget process *should* be considered the most obvious focus in any attempt to promote both efficiency and equity objectives in that it represents a summary of all expenditure programmes. Fiscal measures will ultimately determine the direction of public policy and the actual options on offer. Thus, current financial frameworks, alongside the assumptions associated with mainstream economic theorising, are the prime influences in determining patterns of resource allocation. It follows that such should be the central focus in any evaluation of the gender impact of the resulting allocation and distribution of public monies. The ways in which national governments finance and allocate public goods and services should be designed, implemented and evaluated within an analytical framework that incorporates gender as a relevant variable. Adopting a gender perspective involves thinking about the ways in which things are done and how choices are made rather than merely examining the *outcomes* of those decisions/choices. The budget therefore presents as a crucial focus, and indeed invaluable entry point, in any governments attempts to mainstream gender in terms of economic policy.

3. Doing Gender Budgets – Identifying Governing Principles

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 (see for example Commonwealth Secretariat, June 1999) 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.

Country Ownership - It is considered essential that countries develop their own specific set of procedures and case studies in implementing a gender sensitive approach to the national budget. Although there is a growing body of literature supporting the case for gender sensitive budgeting and, identifying a range of generic tools, success and sustainability are dependent upon the countries concerned 'directing their energies to the generation of 'home grown' concrete examples' (MacKay and Bilton, 2001).

With these points in mind locating some form of gender budget initiative in Scotland was considered not only desirable but perhaps more importantly entirely in keeping with the overarching principles of the newly devolved administration. The political context in Scotland is unique in that the opportunity exists for embracing new and innovative approaches to governance. This change in the political horizon is accompanied by a stated commitment to advance an agenda of equality mainstreaming. 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'.

4. Promoting Gender Sensitive Budgeting in Scotland – The Changing Political Landscape

The new millennium marked a period of significant political and economic change in Scotland. The May 1997 UK general election witnessed the start of a process whereby Scotland would benefit from the establishment of a new Scottish Parliament and Executive, directly responsible for a number of policy areas. The election victory of the New Labour government 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 1997 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 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. Brown argues that:

... this coming together of women ... has helped strengthen the campaign for a more democratic and woman-friendly Scottish Parliament. They have also been mobilised by their belief that a Scottish parliament where half the members are women will be 'different' and will deliver not only a more representative and democratic system of government but also one which encourages the participation

Ailsa McKay
GB Scotland Dec 2004

of women and others in the community and which delivers the type of policies that people in Scotland want.

(2001:223)

It would appear, then, that in addition to campaigning for equal representation 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. Key to this was their role in informing the Consultative Steering Group (CSG) established by the Secretary of State for Scotland in November 1997 to bring together a range of views and to develop proposals for the practical operation and working methods of the new Parliament. The report of the CSG, which served as the blueprint for the shaping of the new Parliament, recommended adopting a model of governance where the concepts of sharing power, accountability, access, participation and equal opportunities would be paramount. (CSG on the Scottish Parliament, 1998). 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 in which they contributed to recommendations of the CSG that:

there should be a standing committee on Equal Opportunities, that a mainstreaming approach should be adopted and an Equality Unit established in the Scottish Executive and that Parliament should operate in a 'family friendly' manner.

(McDonald, Alexander and Sutherland, 2001: 238)

Equal opportunities are therefore to be mainstreamed into the work of the Parliament and through the demands of and scrutiny by the Parliament into the work of the Executive.

The favourable policy framework implied by a commitment to mainstreaming combined with the increased presence of women at such a high political level indicates real potential for promoting gender equality throughout the policy process and across the range of public policy interventions. Indeed, the new political structures and processes have established transparent mechanisms to ensure women's voices across Scotland

Ailsa McKay
GB Scotland Dec 2004

continue to be heard. The Women in Scotland Consultative Forum existed between 1998 and 2003 to “provide a mechanism for women’s organisations in Scotland to communicate their views to the government, to meet with Ministers, to consider specific policy areas of interest and to suggest priorities” (Breitenbach, 2003b: 1). More recently, the Scottish Women’s Convention, funded by the Executive, was set up in 2003 to facilitate better engagement between the Executive and women’s organisations across Scotland (Scottish Executive Equality Unit, 2003). Furthermore, the work of the Equality Unit of the Scottish Executive and the Parliament’s Equal Opportunities Committee serves to ensure that gender concerns remain a strategic priority of the new institutions. This leads Mackay to the conclusion that:

The presence of women MSPs – and the concerns of ordinary women – as a normal and unremarkable part of the polity presents a significant challenge to cultural stereotypes which still constrain and disadvantage, and to the traditional imbalance of power and influence.

(2002a: 284)

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 associated with the dynamics of a new and challenging political environment. The emergence and subsequent activities of the Scottish Women’s Budget Group can be arguably linked positively with this more ‘woman friendly’ political landscape.

5. The Story of the Scottish Women’s Budget Group

In a briefing note prepared for the Strategic Group on Women², Esther Brietenbach acknowledges the work of the Scottish Women’s Budget Group with specific reference to the mainstreaming approach adopted by the Scottish Executive. She identifies the work of the group as a ‘policy initiative’ in advancing gender equality and argues that it ‘does not yet provide concrete examples of gender-sensitive budgeting in terms of shifts in

² This group was appointed by the Minister for Social Justice, Margaret Curran, in January 2003 to identify the issues faced by women in Scotland and to suggest an agenda for action for the next Scottish Executive. It was a ‘short life group, bringing together a number of women with experience in a range of sectors and interests, whose aim was to ‘recommend actions to improve the lives of women in Scotland and which promote and achieve equality between women and men’. (Strategic Group on Women, 2003:17).

Ailsa McKay
GB Scotland Dec 2004

policy priorities, though it offers insights into how concerns about gender inequalities can be advanced' (2003a: 7). Thus, the story of the Scottish Women's Budget group provides valuable lessons for an international audience by demonstrating how a group of committed woman activists have mobilised to ensure that the new institutions embrace the concept of gender sensitive budgeting.

5.1 The Background

Recognising the opportunities afforded by the principles and operation of the new Scottish Parliament, Engender, an information, research and networking organisation for women in Scotland, hosted a seminar in November 1999 to consult with groups and individuals with an interest in forming a women's budget group. The seminar was attended by women from a range of organisations and was addressed by a representative of the UK based Women's Budget Group. Inspired by the work of the UK group, the overall outcome from the meeting was that there was indeed a desire to establish a Scottish based group and to work in close consultation with the Women's Budget Group and to learn from their experience. Although the formal establishment of such a group was to take several months, the immediate action of several of the women attending this initial seminar secured the potential for further progress.

Soon after the seminar, the new administration, the Scottish Executive, produced a consultation document containing proposals for the first round of spending allocation for 2000-2001 and 2001-2002, which presented the emerging Scottish Women's Budget Group (SWBG) with a particular focus. A collective response commenting on the gender impact of specific proposals and calling for a framework to be established to ensure a gender impact analysis was incorporated in the budget process was submitted. The response was received with interest and referred to by the Minister for Finance in his opening statement presenting the first Budget Bill to Parliament;

...our consultation has given us new ideas and ways in which to improve the budget process. The group Engender – which as its name implies, is concerned with gender issues – suggested that we needed to conduct a gender audit across

Ailsa McKay
GB Scotland Dec 2004

our spending programmes to assess their overall impact on women. I have told it that I intend to develop that idea for the future.³

As a result of this representatives of SWBG were invited to give evidence to various Scottish Parliamentary Committees and to attend a meeting with the Minister for Finance to discuss proposals for ensuring that gender impact analysis would become an integral feature of the spending allocation process. These meetings served to further develop a cross party political interest in ensuring that future policy debates, particularly those relating to the budget statement, incorporated a gender impact analysis. However concern was expressed regarding the appropriate mechanisms and tools to be employed.

Responding to these concerns, members of Engender and the loosely formed SWBG began establishing networks of contacts, gathering relevant literature and developing expertise on gender impact analysis and the budget process. Given the range and concentration of activity this required, the need to formalise the Scottish group, and to develop a working strategy, quickly became evident. Thus the Scottish Women's Budget Group (formerly known as Engender Women's Budget Group) was formally constituted in May 2000 with the aim of ensuring that gender impact analysis becomes a mainstream part of the Scottish public policy process. The group brings together women from academia, local communities, the statutory and voluntary sector and trade unions. Although individual members of the group contribute on a voluntary basis, Engender, Oxfam GB and Glasgow Caledonian University support the work of the group.

Funding from Oxfam in March 2002 enabled the employment of a part-time parliamentary liaison and development worker for SWBG. This post was funded for twelve months in the first instance. In April 2003 the post was reviewed and funding was secured for a further twelve months. The new Parliamentary Development Officer took up post in September 2003. The group has subsequently developed considerable expertise in the field of gender sensitive budgeting and their work has been recognised at both a national and international level. In 2002, SWBG's 'story' was included in a

³ Jack McConnell, Minister for Finance, Opening Stage One Debate on Budget (Scotland) Bill 26th January 2000

Ailsa McKay
GB Scotland Dec 2004

Commonwealth Secretariat publication illustrating good practice models of gender budget initiatives. (McKay et al, 2002).

5.2 Aims and objectives of the SWBG

The SWBG aims to encourage the Scottish Parliament and the Executive to change the way decisions are made about how money is spent. Account must be taken of the different social and economic realities of the lives of women and men, girls & boys. Key objectives for the SWBG are:

- to encourage and advise the Scottish Parliament and the Scottish Executive to incorporate a gendered analysis of the impact of all public expenditure;
- to advise the Scottish Parliament, and the Scottish Executive on the links between policy objectives and spending plans;
- to monitor public spending in Scotland and to review how that spending affects women and men;
- to highlight where policy and spending plans result in a negative impact on women.

Key to the work of SWBG is the ability to convince the key players in the Scottish policy making community of the relevance of gender in the budget process. This has involved making the case for gender budgeting to Government Ministers, Parliamentarians, government officials from across a range of policy related departments and perhaps more crucially from finance. The commitment of the new institutions to the principles of access, consultation and equality has been key in facilitating this activity.

5.3 Understanding the Scottish Budgetary Process – A First Step!

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 report (see McKay & Fitzgerald, 2002) 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.

6. Key Achievements in Scotland

6.1 Engaging with the Budget Process

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. As a result, public consultation is a key feature of the way the Executive determines its spending priorities. SWBG is using this opportunity to raise gender awareness and are actively encouraging the Executive and civil servants to ensure that, gender is considered at all stages of the budgetary process. The group prepare a written submission each year following the publication of the Executive's spending proposals and as a result have been invited to give evidence to a range of Parliamentary Committees during the key budget scrutiny stage.

6.2 Forging Working Relationships

Ailsa McKay
GB Scotland Dec 2004

SWBG have been able to forge links with senior civil servants, members of the Executive and elected Members of the Scottish Parliament (MSPs.). Following their initial written response to the first round of spending proposals, referred to above, members of SWBG were invited to a meeting with the Minister of Finance. This meeting was facilitated the then Director of the Equal Opportunities Commission (EOC) Scotland, illustrating both the greater access to senior politicians in the new Scotland and how the new group were successful in securing the support of relevant organisations such as the EOC. 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 and Policy Advisory Group 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. The Scottish Executive published its Draft Budget 2004-05 in September 2003. The budget document highlighted equality considerations, and included an Equality statement in the introduction and each of the portfolio chapters. In their previous submissions to the Scottish Executive, and Parliament, SWBG had identified the need for such statements to be presented in budget documents. SWBG view the inclusion of equality statements as a step forward in equality proofing the budget process and as an indication that the Scottish Executive recognise the expertise of SWBG members in this field. As a result of evidence given by SWBG to the Equal Opportunities Committee in October 2003 the Committee have determined to monitor the development of equality statements across departments in future budgets and have recommended that the Executive report the findings of its work on equality impact assessments to the committee on an ongoing basis. Thus, representation on the Equality Proofing Budgets and Policy Advisory Group, combined with the workings of the Parliamentary committee system, continue to afford SWBG the opportunity to influence the budget process.

In evidence they presented to the Equal Opportunities Committee, and a recent report reviewing the Executive's progress in producing a gender proofed budget, SWBG noted their disappointment that the Draft Budget did not contain the information necessary to

Ailsa McKay
GB Scotland Dec 2004

facilitate this process. The SWBG report drew upon spending plans within the sport portfolio to highlight these omissions and to provide an example of the information required to facilitate a gender impact analysis. SWBG were subsequently invited to submit evidence to the Enterprise and Culture Committee regarding how the priorities and expenditure of sports bodies funded by the Executive will address the issue of gender equality.

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 the budget to the Finance Committee who subsequently prepare a report to the Executive, which is debated in Parliament. A priority for SWBG therefore is to engage with the Finance Committee. The group has made recommendations to the committee and have subsequently met with the Convenor of the Finance Committee to discuss how these recommendations can be taken forward. Reports from various subject committees have also proved useful in encouraging the Finance Committee to progress the gender budgeting agenda. For example SWBG have recently written to the Finance Committee supporting the recommendation of the Procedures Committee regarding the establishment of an expert equality panel on the budget. The Budget Advisor to the Finance Committee is also an observer on the Equality Proofing Budgets and Policy Advisory Group thus providing SWBG with a further link to the committee.

SWBG recognises that building capacity within the Scottish Executive and engaging them in creating and using the tools necessary to achieve progress will take time. Therefore, the Group is working in a range of ways to promote gender equality in public spending:

- Monitoring the Scottish Executive's spending plans and budget documents
- Holding regular meetings and seminars
- Making submissions on spending plans, providing responses to consultations documents and giving evidence to committees of the Scottish Parliament
- Meeting with ministers, MSPs and Scottish Executive officials

- Participating in the Scottish Executive's Equality Proofing Budgets and Policy Advisory Group

6.3 Building Capacity Within

A priority for SWBG is to work with other groups of women to raise awareness of how government spending plans in Scotland can affect their lives. This will involve partnerships with other groups, organising seminars, events and participating in meetings, training and conferences across Scotland.

SWBG has forged links with the UK based Women's Budget Group and similar groups in Wales and Ireland. Liaising with such groups has proved invaluable in terms of sharing experience and knowledge. A key aspect of this work is the Pan Islands Network, which involves similar groups across the UK and Ireland meeting every six months for the purpose of sharing experience and providing updates on respective developments.

With reference to networking and sharing of experience SWBG members have been involved in significant activity at an international level. Contact has been made with similar groups across Europe and members have given presentations at a number of international meetings.

SWBG are also working towards raising awareness of gender sensitive budgeting in local government, Scottish universities and women's organizations. For the purpose pilot work is underway in developing a series of seminars focused on promoting economic literacy amongst women activists. The first seminar is due to take place January 2005 and the intention is to disseminate the materials developed to a wider international audience.

Thus, SWBG have made significant progress in advancing their agenda in the new Scotland;

All of this activity demonstrates how a group of women acted collectively and embraced the opportunity presented by the devolution settlement to engage with the new institutions in attempts to promote a more gender equal Scotland. Furthermore, their work has attracted significant attention from an international audience interested in exploring how women can make a difference to the public

Ailsa McKay
GB Scotland Dec 2004

policy making processes, particularly in the area of national budgeting practices.
(McKay et al, 2002)

7. Lessons and ‘Warnings’ from the Scottish Experience

7.1 The Scottish Executive’s Commitment to Equality

The Scottish Executive has given a clear commitment to equal opportunities. It has taken a broad focus, including race, disability and gender:

We will promote equal opportunities and challenge discriminatory attitudes and practices. We are working to make sure equal opportunities for all is part and parcel of all our programmes. Gender, race, sexual orientation, disability, age – these should not be allowed to affect choice and opportunity in the new Scotland
(Scottish Executive, 1999)

However, SWBG is concerned that this broad focus downplays the importance of gender. Addressing gender in the first instance would provide insights into the social construction of inequality and how discriminatory practices can sustain and even promote inequity. Gender as a lens can help identify other inequalities relating to race, religion, disability and age. This would aid the process of developing an understanding of the nature of a whole range of inequalities. SWBG continue to emphasise the relevance of gender in promoting an overall equalities agenda.

7.2 Inequalities for Women Remain

Inequality between women and men is both a widespread and persistent feature of contemporary Scottish society. Although there have been many great advances for women over the last century and a higher profile for equal opportunities in Scotland since the establishment of the Scottish Parliament and Scottish Executive, in general women today still have less access than men to income and other material resources, less time that is their own, less political power and have a 1 in 5 chance of experiencing domestic abuse during their lives.
(Strategic Group on Women, 2003)

Ailsa McKay
GB Scotland Dec 2004

A recent report commissioned by the Scottish Executive illustrates the position of women compared to men in Scotland today :

- Women have less access than men to income, earnings, pensions and material resources such as cars or housing;
- Women have less access than men to time that is their own and not spent on caring for other people or on paid or unpaid work;
- Women have less access than men to political power and to decision making across a range of public bodies
- Women have a one in five chance of experiencing domestic abuse during their lives

(Scottish Executive, 2003)

SWBG therefore remain concerned that most policy making and spending decisions are failing to adequately address the gender inequalities that are an inherent feature of contemporary Scottish society.

Furthermore in evidence presented to the Equal Opportunities Committee about the Scottish Executive's annual spending plans for 2005-6 SWBG expressed frustration about the slow pace of change in the budget process and the distinct lack of gender specific targets (SWBG, 2004).

8. Conclusion – Policy v's Process – Possible Tensions ?

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 Executive 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 four years, there has been no evidence of actual policy shifts to promote gender equality and the budget itself remains

Ailsa McKay
GB Scotland Dec 2004

gender neutral. Although there is implicit recognition, both on behalf of the Executive 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.

Furthermore the focus on process in Scotland has served to identify key barriers in developing gender budgeting in any country;

- Transparency of the budget process is very difficult to achieve and sustain considering the dynamics of budgetary reform processes. Also given the political nature of budgets it is often unclear as to who is accountable for particular reforms/change.
- Participation is difficult to sustain when there is little evidence of progress in terms of policy developments. This combined with the fact that members of SWBG contribute on a voluntary basis has served to diminish the resources in terms of human capital available to the group. There has been a tendency to switch the emphasis from examining the actual way budget decisions are made to looking at the policy outcomes and whilst this is useful in itself, it can result in detracting from the key issue – the role of the budget in informing such policy outcomes and thus the role of the budget in sustaining and even creating gender inequalities.

The experience of the Scottish initiative provides important insights into the practical application of gender sensitive approaches to budgeting not least of which is the issue concerning policy v's process. In considering the way forward for SWBG two crucial questions need to be resolved which are worth sharing –

- ***What role should SWBG play?***

Ailsa McKay
GB Scotland Dec 2004

Should the group adopt a more critical approach and emphasise their lobbying/campaigning function or should they ensure we maintain our working relationship with the Executive? Are the two functions mutually exclusive?

How do SWBG continue to promote the issue of changing the way things are done (the policy process) without actually doing anything about what is done (the policy outcomes)?

SWBG will continue to work towards resolving these issues and will endeavour to share their experience with others.

References

- Breitenbach (2003) *Women in Scotland Consultative Forum*, Briefing Note for the Strategic Group on Women June 2003.
- Brown, A. (2001) 'Deepening Democracy: 'Women and the Scottish Parliament' in Breitenbach E. and Mackay F (eds.) *Women and Contemporary Scottish Politics*, Polygon, Edinburgh University
- Commonwealth Secretariat (1999) *Gender Budget Initiative: A Commonwealth Initiative to Integrate Gender into National Budgetary Processes*. London, Commonwealth Secretariat
- Consultative Steering Group on the Scottish Parliament (1998) *Shaping Scotland's Parliament*, Edinburgh, The Scottish Office.
- Elson, Diane (2000) *Gender Budget Initiatives as an aid to Gender Mainstreaming*, Paper delivered to the Ministerial Conference on Gender Mainstreaming, Competitiveness and Growth, OECD, Paris 23-24 November 2000.
- Himmelweit, Susan (2002) Making Visible the Hidden Economy: The Case for Gender Impact Analysis of Economic Policy *Feminist Economics*, Vol 8 No 1 pp49-70
- McDonald, R. with Alexander, M. and Sutherland, L. (2001) 'Networking for Equality and a Scottish Parliament: the Women's Co-ordination Group and Organisational Alliances' in Breitenbach E. and Mackay F (eds) *Women and Contemporary Scottish Politics*, Polygon, Edinburgh University
- MacKay, Fiona & Bilton, Kate (2001) *Equality Proofing Procedures in Drafting Legislation: International Comparisons*. Governance of Scotland Forum
- Mackay, F. (2002) 'A Slow Revolution? Gender Relations in Contemporary Scotland' in Hassan, G. and Warhurst, C. (eds.) *Anatomy of the New Scotland Power, Influence and Change*. Mainstream Publishing, Edinburgh and London
- McKay, Ailsa & Fitzgerald Rona,(2002) *Exploring the Role of Gender Impact assessment in the Scottish Budgetary Process*, Scottish Executive:Equality Unit, Sept 2002.
- McKay, A., Fitzgerald, R., O Hagan, A., and Gillespie, M. (2002) 'Scotland: Using political change to advance gender concerns' in Budlender and Hewitt (eds.) *Gender Budgets Make More Cents: Country Studies and Good Practice*, Commonwealth Secretariat: London

Ailsa McKay
GB Scotland Dec 2004

Scottish Executive (2000) *Equality Strategy: Working together for equality*.
November 2000

Scottish Executive Equality Unit (2003) *Scottish Women's Convention: Would you like to be involved?* Letter to Women's Organisations in Scotland, August 2003.

Scottish Executive (1999) Social Justice – A Scotland Where Everyone Matters

Scottish Women's Budget Group (2004) *Response to Equal Opportunities Committee Request for Views on the Scottish Executive's Annual Evaluation Report 2005/06*, Edinburgh: Scottish Women's Budget Group.

Sharpe, R. and Broomhill, R. (2002) Budgeting for Equality *Feminist Economics*, Vol 8, no1, pp 25-47

Strategic Group on Women (2003) *Improving the Position of Women in Scotland: An Agenda for Action*. Scottish Executive