



**Curtin University**

# Gender Budgeting: The Role of Civil Society

**Professor Helen Hodgson, Curtin Law School**

**Director, National Foundation for Australian Women**

# What is Gender Budgeting?

- “A tool to assess the gender impact of policies”  
(Sharp 2001)
- Distinguished from gender neutrality as it assesses the effect of policies  
Treating all citizens the same does not recognise the real effect of policies  
Similar arguments can be made for other groups at a historical economic disadvantage

# Developing a Gender Budget

- Policy & programme development
  1. Data should be gender disaggregated
  2. Facilitate women's participation in the budget process
    - Consultation and capacity building
    - Recognise the effect of care responsibilities
  3. Budget Expenditure
    - Report on effectiveness and review adequacy of targeted allocations
    - Measure and report effect of mainstream programmes
    - Enforce equal opportunity principles in government contracts
    - Cross agency collaboration
  4. Review the design of the tax transfer system
  5. Implement gender reviews in aid programmes

(Sharp and Elson, 2009)



# Post-Hoc Gender Analysis of a Budget

- Post-hoc analysis
  1. Assess gender-based programmes within each department
  2. Review internal equal opportunity programmes
  3. Examine mainstream policies for gender effects, including whether that effect is intentional or unintentional

(Sharp & Broomhill, 1990)

# Different Models

- Internal: full gender budgeting needs to be done by government
- Challenges:
  - “Capture” – what can the Minister to announce this year/month/week
  - Focus on success stories –becomes a PR exercise
  - Need cross agency support on initiatives, coordinated at a high level
- External: Post-hoc Gender Analysis
  - Civil society: independent line by line review
  - Generally academics or agencies with access to research and/or decision makers: NFAW (Australia); WBG (UK)
- Civil Society may step in where a government is not active or where the process has become compromised
  - BUT success depends on expertise and access to information

# Gender Budgeting in Australia: Introduction

- Acknowledged as one of the pioneers
- Implemented in 1984 as part of the “accord” social reforms:
  - Endorsed four key priority areas for women
    - Access to employment training and education;
    - Taxation and income security;
    - Services for women; and
    - Research and information for women; and
  - Strategies ... for achieving progress with the Government’s objectives for women
- Administered by the Office for Women
  - headed by Dr Anne Summers
  - Women’s Policy Officer in each Department

# Gender Budgeting in Australia: Phase 1 1984-96

- Early Women's Budget Statements

Provided a comprehensive statement from each portfolio agency setting out the implications of their expenditure (and sometimes revenue raising) for women and men.

Gender disaggregated data was commonly provided in relation to program performance.

- 1991 Women's Budget Statement identified specific initiatives but not full programme costings:

“In order to place the *Women's Budget Statement* within the context of the Budget Papers, each portfolio reports in a format which reflects the Departmental program budgeting structure. Not all programs have been discussed. This reflects the primary aim of the document which is to concentrate on aspects of the Budget which have the greatest impact on women.”

To obtain costings for programmes, users needed to cross reference back to Budget paper No 3 and portfolio explanatory notes.

# Gender Budgeting in Australia: Phase 2 1996 - 2014

- Howard (Coalition) Rudd-Gillard-Rudd (ALP)
  - Some retrograde policies: Family Tax Allowance; First Baby Tax Offset
- Coincided with downgrading of the role of the Office for Women
  - From PMC to Social Services (FaHCSIA)
  - Women's policy officers in departments consulted re the effect of decisions, rather than in the design of the policy
  - See Sawer 1999



# Gender Budgeting in Australia: Phase 2

- Women's Budget Paper became Ministerial Statements released with the budget "Glossies" announcing initiatives and applauding successes "a summary of the Government's achievements in supporting working Australians and their families, building a new Australian economy and strengthening our communities – underpinned by key 2012-13 Budget measures." (2012)

# Gender Budgeting in Australia: Phase 3 2014 -> Civil Society Steps In

- The last Women's Budget Statement was 2013
  - Had become increasingly less useful
  - Note 2018-19: [Media release](#)
  - Womens' Economic Statement Nov 2018
- [2014-15](#) – 2018-19: "Gender Lens on the Budget"
  - National Foundation of Australian Women
  - [www.NFAW.org](http://www.NFAW.org)
- Reviews mainstream measures as well as gender initiatives
  - Eg effect of superannuation system
- Line by line analysis of entire budget
  - Non partisan

# NFAW: Gender Lens 2018-19 [www.nfaw.org](http://www.nfaw.org)

- Net impact on women
- young women
- older women
- indigenous women
- migrant and refugee women
- women with disabilities
- Revenue and fiscal outlook
- Social services
- Education & Training
- Employment
- Health
- Older women
- Violence against women
- Infrastructure
- Energy
- International Development



# Ongoing Analysis

- Womens' Economic Statement Nov 2018
- NFAW gender analysis of election policies
  - Some in 2010, more comprehensive from 2013 onwards
  - Currently developing position papers
  - [www.nfaw.org](http://www.nfaw.org)
- Enquiries & reviews

# Expertise:

- Core contributors from Social Policy Committee:  
Led by Marie Coleman AC
- Wider group of experts:  
Experienced former public sector policy makers  
Academics with particular policy/gender expertise  
Representatives of Community Groups
- Based on issues that emerge in public debate
- If you have expertise and want to be involved I can be contacted on [helenhodgson@curtin.edu.au](mailto:helenhodgson@curtin.edu.au)

# References

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