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**“Gender Budget in South Italy,
an exploratory case study ”**

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Gender Budget in South Italy, an exploratory case study

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Abstract

The 1990s saw the emergence of an international consensus on the promotion of Gender Equality with the 1995 World Social Summit on Development (WSSD), the Fourth World Conference on Women in Beijing (FWCW), and the International Conference on Population and Development (ICPD). Signatory countries decided to integrate the goals of these conferences into their policy plans through new resources and ensuring transparency and accountability in their budget processes. More and more we assist at the introduction of a Gender perspective into government budgets, in a way that government's raising and spending is organized to promote Gender Equality. In particular, Gender budget analysis is recognized to be an important way to hold governments accountable for their commitments to human rights and Gender Equality connect these commitments to the distribution, use, and generation of public resources. The aim of this paper, after a short introduction to Gender Mainstreaming and some of key ideas and tools of Gender budgeting, is to present the case of Gender Budget initiative in the Province of Lecce (South of Italy).

Keywords: Gender Mainstreaming, Gender Budget, Women, South Italy

1 – Gender Budget's, principles

In all societies, access to resources, rights and power are still unequally distributed between women and men. In almost all areas of life, this unequal distribution of wealth, power and quality of life is more favourable to men than to women. All public policies play a role in contributing to achieving the important political, economic and social goal of equality between women and men. In particular, a government's decision about how money is raised, through a range of different

taxation measures, and about how money is spent, can either widen or reduce the gap between the situation of women and men in society. Budgets transform governments' political priorities and commitments into practical measures. In working to achieve a more equal society, it is therefore important to question if a commitment to Gender Equality is taken into account when decisions are made by our governments, about how money is raised and spent. "Gender budgeting" is the process through which public budgets are examined in order to assess whether they do or they do not contribute to more equality between women and men, and then to introduce changes that promote Gender Equality accordingly. Budgets are considered by governments and by citizens to be Gender neutral policy instruments, they are generally seen as not having different impacts on the situations of women and men. However, due to the fact that women still have less economic, social and political power than men, public spending as well as the different ways that governments choose to raise their income often does have a different impact on women and men. Budgets are not merely technical documents; they reflect how governments set their priorities and shape and implement their policies. Gender Budget is a critical analysis tool that allows to have a complete picture of the consequences that the choices of governments, have on the population. It allows to obtain a clear role of government in relation to Gender differences, pointing out policy choices, have a different impact on men than women. With this tool, in fact, one can determine the status of implementation of equal opportunities within the territory analyzed and if public resources, can still make it possible to achieve the goal of Gender Equity. From this general framework, the Administration, studying the factors that determine disparities, may correct them through means at its disposal. If the policies identified are considered adequate, they can then analyze the budget, to assess whether the financial resources have been allocated in order to make possible and effective policies. The final step is the control of how resources are used, through an assessment of the actual use of the services offered. The Gender Budget is an instrument of democracy and transparency in order to achieve equal opportunities between women and men. It is therefore not a neutral tool. Consequently, all the programs and measures to be taken must comply with the objective of equality between women and men, and be evaluated on the basis of the effects they produce on the relationship between the sexes.

2 – Gender Budget history

The very first Gender budgeting initiative was started by women's organisations in Australia in 1984. The example of Australia was not only crucial because put in evidence the importance of this technique, but because its approach served as an important reference point for subsequent initiatives taken in this direction. In September 2000, the Equal Opportunity Commission of Italy sponsored an international workshop on Gender auditing of government budgets. The main sessions focused on experiences in Australia, United Kingdom, the European Union and three Afri-

can countries (Uganda, South Africa and Tanzania). The event included a round-table debate with the participation of Italian government authorities and consultants in charge of drafting or analysing budgets at local and national level. The event was intended primarily as an information-sharing event and the majority of participants were academics. However, the programme included practical sessions run by Rhonda Sharp of Australia and Sue Himmelweit of the United Kingdom. Some of the main projects concerning Gender Budget were conducted in Italy by the provinces and municipalities participating in the network specially formed to promote this instrument of government. Currently members of this network are 12 provinces and 9 municipalities, for a total population represented of 10.5 million inhabitants around. The network in recent years has significantly contributed to promote the spread of Gender Budget, either through meetings and seminars annually promoted which offer a broad-based institutional visibility to this topic. As evidence of that this argument is arousing, especially in local communities, need only recall that typing "Gender budget" on www.google.it, you can find on 27th August 2008 nearly 39,000 entries devoted to this topic. The initiative, whose leader is the Province of Genoa, was launched in 2002 at the request of the Provinces of Modena and Siena, and over the years, has developed to support, qualify and promote the development of all resources for women effective implementation of equal opportunity and equality between women and men.

3 – Gender Mainstreaming

The terms derived from English and consists of the word "Gender" (Gender, or Gender in its social dimension) and the word "mainstreaming" (put at the centre of mainstream). While Italian language knows a single term to describe the "sex", the English language makes a distinction between the term "sex", generally understood as biological and the term "Gender", indicating, however, the social kind. This distinction is explained by the fact that Gender roles are not natural models, but rather mere social conventions imposed by society. They differ within individual cultures and may change over time. The Gender roles are not immutable, but lends itself to discussed and redefined. Mainstreaming means integrating a certain thought or a certain action at the heart of "mainstream" in the middle, The issue of equity between the sexes can not be relegated to question concerning only women, but must be tackled seriously by all those makers and actors operating in a sector and be integrated into all phases of planning, decision-making and implementation.

4-Gender budget's objectives

The main objective of the Gender Budget is undertaking an analysis of the difference between women and men, about the quality of life, the needs, interests and choices of economic and social

interventions. The Gender Budget is an instrument of democracy and transparency in order to achieve equal opportunities between women and men. Objectives are consequential: Increased participation of women in economic decision-making and budgetary processes and improvement of public consultation and participation in the preparation and control of budgets. Gender Budgeting seeks to increase participation of women, to promote a greater understanding for citizens of budgetary issues, to improve transparency and efficiency in terms of results of the government, and budgetary decisions, to increase the possibility of governments to be accountable for their commitments to Gender Equality. In making the budget process more transparent and consultative, governments may be forced to assume their responsibility for drawing up budgets. As a result of these issues, Gender Budget:

1. Promotes Equity, Efficiency and Effectiveness (3 E), in the planning and implementation of public policies.
2. Promotes transparency in the allocation and reallocation of public resources.
3. Diffuses through information and participation of citizenship the culture of equality between Genders.

1. 1 Objective 3E

– *Equity*

The public budgets are not neutral instruments of economic policy in respect to differences between women and men, resources and expenses of governments have different impacts on them. It is therefore necessary to pay attention to establishing the budget, so that also protects the rights of all, ensuring that Gender Equality is a goal that is an indicator of economic policy;

– *Efficiency*

The Gender differences lead to increasingly significant losses in economic efficiency and human development, especially in tax policy decisions related to revenues and expenditures. By analyzing the different needs for Genders, is possible to use the available resources to cover the needs of all and, thus, not only differentiate budget items in terms of Gender but, above all, avoid wastage of public money;

– *Effectiveness*

Last of three points, analyzes the final outcome and the ability of policies to achieve results. In Gender currency, then, how much political action adopted, has been able to bridge the Gender differences of the original objectives.

2. Objective 2: Transparency

The second objective is to communicate to users, actions and policies adopted by the institution. Gender budgeting, is supported by international accountability procedures used to estab-

lish social budgets, which add to their internal vision, helpful tools for better reporting equality.

3. Objective 3: Information, Culture Participation

The Gender Budget has been called a democratic instrument and requires awareness and participation of all citizens. Although the premise as a solid knowledge base, and thus transparency of the work of an institution, the third objective of awareness, provides for participation of citizenship enlarged wider relationship institution-citizen, involving in the form of the active presence organizations and all other forms of social participation (especially women's groups). These subjects are recognized as having a key role in promoting equal opportunities in a broader process of democratic participation. Through information, we can spread the culture of equal opportunities in every sector of public life, from the family than working, and socially than politically. Equality between women and men is a fundamental right, a common value and a necessary condition for the achievement of the Community objectives of growth, employment and social cohesion. The EU has made significant progress in achieving Gender Equality, thanks to legislation on equal treatment, to Gender mainstreaming in policies, specific measures for the advancement of women, action programs, social dialogue and dialogue with civil society.

5 – Case Study

The case study here analyzed, concerns a public body territorial, who first aims to draw up the Gender Budget, the Province of Lecce (South of Italy) The Province of Lecce is a southern province of Puglia of 809,129 inhabitants, the second most populated in the region after Bari. It is totally included in the geographical region of Salento and it extends to 2.759,39 square kilometres (14.3% of Apulia).The social and cultural centre of the province is the capital, Lecce. The town is located 11 km from the Adriatic coast and 23 from the Ionian sea at the heart of a densely urbanized area. The Province of Lecce, as over communal body, plays a key role into its own district as promoter of economics and social growth of the area, considering its decision making power on the area government. The Province of Lecce has decided to be involved during the past years in a process of Gender Mainstreaming in local public policies. Province's purpose is to diffuse a new Gender sensitive way of thinking, spread by the administration to all other local institutions, social partners and business.

6 – Research Methodology

In order to define and describe different components for our paper the overall research methodology used is based on an exploratory analysis. As the range of the study consists on a new pheno-

menon and as the behaviour cannot be controlled, the most appropriate strategy for conducting this research consisted on a case study strategy (Yin, 1994). This approach was identified as an appropriate, easy, rapid, cost-effective way to document Gender Budgeting in the South of Italy. The working group was born as a result of a Master in Corporate Social Responsibility, which has linked the lives of professional trainees and tutors, involving them in this ambitious project. The interest coming by the theoretical basis gained during the lectures, led the participants to continue with this important document: the Gender Budget of the Province of Lecce. The activities of internship, began on February 16, 2008, and were marked initially by lectures held at the headquarters of the Province by Dr. Roberto Serra. Having passed the theoretical stage, work has continued with a series of informal meetings, where consultants, Dr. Roberto Carella and Dr. Mirko Vitali, following the various profiles of trainees, have assigned the various parties and phases of work. Basically, the work team was divided into two major groups, one applied to operational phase of front office, and the other for back office. The front office group has been involved with identifying areas of the Province directly and indirectly related to Gender with meetings with leaders of various sectors. The meetings were aimed to collect data and information about the work and projects carried out in the years 2007\2008. All data collected were then studied and analyzed in order to be subsequently reported in the Gender Budget. The group has met the leaders of areas: Policies, Safety and Social Quality, Tourism and Territorial Marketing, Equal opportunities, Work Policies. The Group of back office, not present in the meetings, drew up the work.

7 – Methodology of Gender Budgeting

The methodology applied for the development of Gender budget of the Province of Lecce refers to similar experiments already conducted in Italy from 2001 at the Province of Genoa, and today completed or about to be concluded at many other local realities. The Anglo-Saxon terminology in use in fact distinguishes between Gender auditing, usually applied on an approved budget to survey and Gender budgeting, usually applied in the construction of a real budget. Projects typically conducted in Italy have begun by Gender auditing, analyzing a budget that is approved to report, and going to grasp the fallout of Gender compared to the resources allocated. What in the initial phase is a "product", presented as analysis reports, becomes one of the components of the "process" in which introduces the approach of Gender in all moments of action of a public body: the reflections and evaluations that may arise from the analysis of the Gender Budget balance in fact become the foundation on which we can then proceed in following the redefinition of policies and construction of a new budget estimates more adherent to the needs of citizens. At the same time, retracing the steps that characterize the act of a public body, the data in the budget survey were then compared with data management that define the effectiveness and efficiency of ser-

vices, for which we use new tools cognitive to better respond to the real needs of citizens. The methodology of "Performance oriented budgeting" has been remixed in order to meet the specificity of local Italian territorial bodies, making constant reference to the objectives set by the theory. The themes on which it was articulated are:

- what are the needs of citizens (demand for services)
 - how the administration responds to the needs of women and men (providing services) through: Policy choices, the commitments made in the budget, the offered services
 - which is the level of equal opportunities reached within the Province.
- 1) Analysis of context: The first step in understanding the repercussions on women and men of a certain political act is to know their citizenship in statistical variables that best know how to seize personal life, family, work and social integration of people. As Gender differences that emerge from a reading of the national data can claim at least as trends, even at the local level, Gender analysis is certainly more effective if we can seize the Gender differences of the territory under consideration, offering the elements of knowledge most useful to report the needs of the citizens of the answers.
 - 2) Analysis of demand for services: In support of analysis of the context, analysis of services refers to a depth of some segments of the population that might be particularly interested in a particular service of Province. How it will respond to the needs of citizenship in terms of women and men, is described through the analysis of an institution's activities, from political choices and strategic, budgetary decisions, to get the delivery of services offered to citizenship.
 - 3) Analysis of policy choices: We started from the program of mandate and the main policy documents of the government that has highlighted the areas of services that best contribute to bridging Gender inequalities between citizenship: We found not only the political programs on equal opportunities, but also the emphasis placed by the Province on matters pertaining to employment, training, social, education, etc.. An evaluation part was made for environmental areas that more and more may affect the quality of life of women. Reading documents with this new perspective could afford to see how the objectives shared with citizenship were then reflected in the budget choices and then through the allocation of resources and their use in offering services to citizen.
 - 4) Reclassification and analysis of budget. The budget structure of a public body, established in accordance with the law has certainly the aim of reaching a correct and complete representation of the accounting and financial activity. In this sense the classification generally adopted meet the principles of "unity, annuities, universality and integrity, truthfulness, balance financial communication". Despite many possibilities of detail and depth of financial postal, and the vast opportunity to articulate and codify the entries, it is not possible to reach the objective of proper representation of the most relevant voices to Gender. To achieve transparency

reading over these issues, we must reclassify the budget with criteria of priority, able to represent with an order of decreasing importance, such intervention areas affected to a greater extent on equal opportunities. From a technical point of view we have then to proceed to a breakdown in the centers or analytical cost-items of Peg for the Province, which represents the more descriptive level of encoding of the services provided, then play an aggregation by order of importance. We have then identified three areas of "inherence" to Gender: area directly related to Gender, area indirectly related to Gender, environmental area. The fourth area, neutral area, represents the institution's activities for which there are no significant effects on Gender differences, but we don't deal of this area. Please note that the classification should be read in terms of prevalence because there is no budget item entirely irrelevant for Gender.

Areas Scheme

- Area directly related to Gender: Represent the spending made expressly for activities aimed to equal opportunities and to overcome the inequalities between women and men. This item is particularly significant in the budget of a body such as the Province that has lines of funding specifically dedicated (see European Social Fund Measure E1) These are the areas of intervention related to specific issues of Gender, with a specific purpose of growth in Gender Equality. These areas include initiatives targeted specifically at women or institutions for the promotion of Gender awareness.
- Area indirectly related to Gender: Represent area of intervention in which the impact of Gender notes in the aspects indirectly related to Gender differences: Family, Work, Health, Housing, Culture, etc.. This covers all activities directed at groups of residents, such as children, the elderly, weak or who have a significant impact on Gender differences.
- Environmental Area. Represent area of intervention in which the Gender mainstreaming approach is constantly taking into account with respect to environmental variables that can influence different quality of life of women and men. These refer to a whole series of services provided that are not intended directly to the person, but on issues affecting the quality and choices of human life to a significant extent. These services such as transport and roads, security, green parks, culture, sport, entertainment etc.
- Neutral Area: Represents the institution's activities for which there are no significant effects against Gender differences.

From a technical point of view we started our analysis from a breakdown in terms of analytical centers and centers of cost items (Peg executive management) of the Province of Lecce, representing the level of encoding more descriptive of the services, then we remixed in order of importance. It was done a thorough study of the internal structure of the Province of Lecce.

it is composed of 7 sectors, representing different services, these areas are:

- Strategic-sector preparedness and youth policy and immigration, tourism marketing and planning;
- Sector institutions, communication, planning and control;
- Sector procurement and mobility;
- Sector industry and environment;
- Sector development and socio-cultural education;
- Sector capital and labor;
- Sector resources

After this we analyzed 3 areas in particular: Equal Opportunities, Safety and Social Quality, Policies of Labor. For these 3 areas was then carried out an analysis of specific “Determine” which are documents where are showed all expenditures related to the service. Determine have been analyzed in detail and were recorded related about the impact on Gender. Results coming from the analysis of each Determine were organized into three macro areas (directly, indirectly related to the Gender and environmental) and then commented. The same analytical work was carried out on Peg 2007 and on the documents of programming to the internal (Provisional Report for the period 2005-2008) to highlight Gender policies and reclassify present. The analytical work has produced a document that was discussed by the group that worked and finalized in the Gender Budget. The activity continued with a series of planned interviews with assessors and officials of the Province of Lecce to detect objects which are linked to Gender balance by referring to three areas: the Gender policies, policies that have significant impact Gender and policies aimed at achieving the objectives of equal opportunity. The Group interviewed officials of the following areas: Production Activities, Health, Personal, Vocational Training, Employment Policies, Transport. This analysis was made then, through a description of certain target in a position to offer some guidance on the reading of the demand for service; The details of the response to the needs of citizenship in terms of women and men, was described by analyzing the activity of the institution, the choices of policies and strategic direction, with budgetary decisions, to get to the provision of services to citizenship. During the work on formulating the Gender Budget of the Province of Lecce were there have been meetings, ongoing evaluation in the provincial table, in particular a moment to verify both the analysis and reclassification of expenses at “The Pink Night” event dedicated to the female, between meetings, music, exhibitions and literature, held in Otranto on 21 June 2008, and in this occasion was made a survey with all female stakeholder participants whose results are part of the Gender Budget. Women participants were addressed: "What women want from politics, society, family and work". Data which have emerged were then inserted into the Gender Budget. This phase was coordinated by the Office of Councilor of Equality of the Province of Lecce Dr. Serenella Molendini. Following this phase were evaluate follow-up actions to be promoted in individual municipalities for the theme of Gender Equality.

- 5) The indicators of effectiveness and efficiency, as identified by Gender, represent the point of synthesis between meeting the needs of citizens and the response in terms of service. European Union gives a great value to these tools of reading, which are able to express their full capacity summary only if they arrive at the end of a process descriptive and analytical able to make them contextual reference to the environment. A provincial level we have tried to use a set of Gender indicators to be included in information systems and statistical EU countries. The European Councils of Lisbon and Stockholm have produced a set of specific indicators for Gender Equality, divided into 8 areas, which have then been part of the "European Employment Strategy", "Social Inclusion Strategy" and "Framework Strategy on Gender Equality 2001-2005":
1. Women in Decision-making
 2. Women in the work market
 3. The wage differentials between women and men
 4. Women in research and science
 5. Reconciliation Work-Family
 6. Violence against women
 7. Trafficking of women
 8. The process of social inclusion
- 6) The Equal Opportunities' within Provincial Administration

8 – Critical and barriers

The political commitment is very important, but not always sufficient, the initiative created by the Office of Councilor for Equality of the Province of Lecce has encountered many difficulties and resistance.

Without similar commitment by politicians and executives, which means that the Gender budgeting should be placed on the political agenda, to be stressed and supported to be able to give its input in decision-making processes and procedures of the Province. There is sometimes a lack of Gender awareness and analysis of competence within the various political areas there is also the lack of data disaggregated for Gender statistics, or sometimes are not available statistics and reports.

There is also the need for more research on the relationship "care economy" and market economy and its impact on equality. Future challenges is to integrate a Gender perspective in politics and in the same organization of the Province. The Gender Budget, is also an instrument of internal and external body.

9-Lessons learnt

The integration of a Gender perspective in the budgetary process is not easy. The experience of Province of Lecce has shown that a comprehensive training program is necessary. Training must be tailor-made for civil servants at different levels, giving them special training in accordance with their role and responsibility, managers, officials, coordinators of the budget. We have also seen that a proper analysis can not be made without thorough knowledge of the specific area, which means that public servants must be trained in ways to make Gender analysis. The need help and support by experts of Gender Budget and they should have specific knowledge in the field. There is also a need to develop methods of Gender analysis integrated into ordinary and procedures.

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