

# Budgetary Impact Analysis: A Catalyst for Economic Growth



**NI  
WOMEN'S  
BUDGET  
GROUP**



**CHIEF  
EXECUTIVES'  
FORUM**



In partnership with

**Belfast  
City Council**



# Welcome

**Dr Angela O'Hagan**

# **Advancing Gender Equality with Gender Budgeting**

**Chief Executives' Forum NI**

**14 May 2018**

Angela O'Hagan

Glasgow Caledonian University

*“Surely little the State does is more important than constantly using so much of the nation’s work and wealth.*

*Few other governmental activities so consistently affect the everyday life of citizens.”*

*(Heclo and Wildavsky 1981, xi The Private Government of Public Money)*

# Gender Budgeting

- Challenge assumption that budgets are gender-neutral
- Examination of allocation of public resources for impact on women and men
- Redistribution of resources to advance equality
- Gender impact assessment and gender policy analysis reveal different and unequal outcomes for women and men from public spending decisions
- Challenge system of national accounts - making care and unpaid work visible.



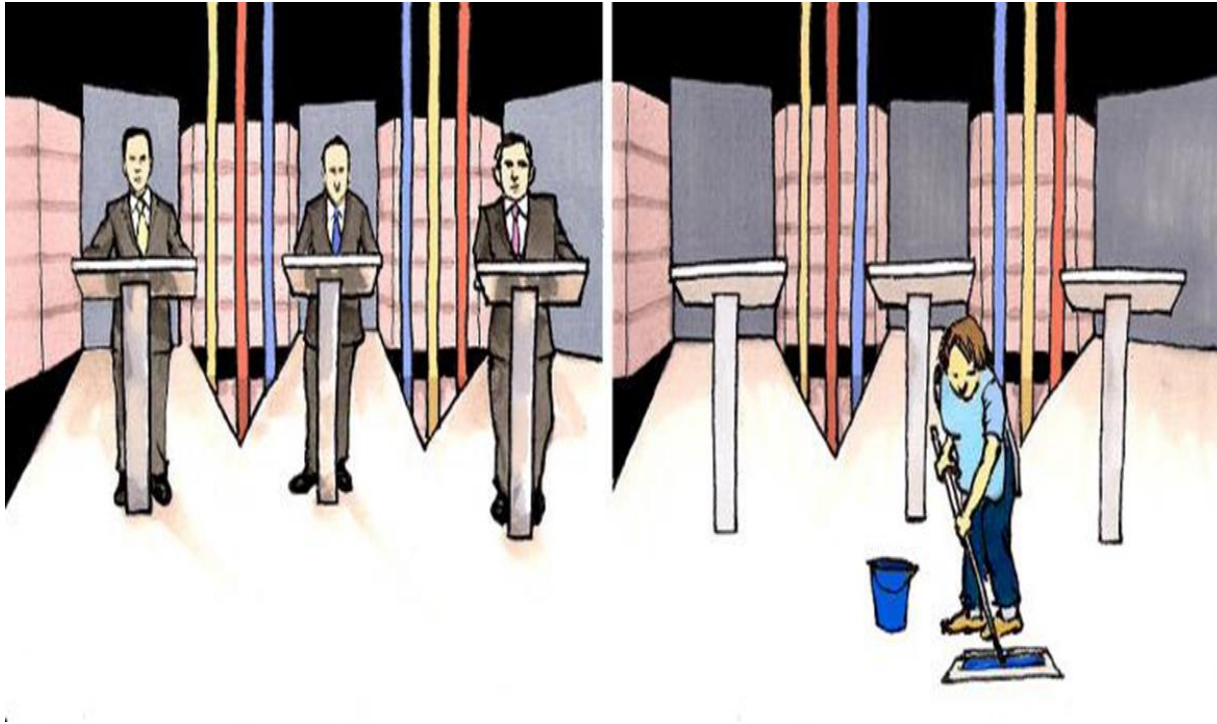
# Gender Budgeting

- Core purpose of gender budgeting is to “change policies, programs and resource allocation so that they promote gender equality and the empowerment of women”  
(Sharp and Dev, 2004)
- **EXAMINATION** of how budgetary allocations affect the economic and social opportunities of women and men
- **RESTRUCTURING** of those revenue and expenditure portfolios that negatively affect the achievement of gender equality.

# Gender Budgeting

- Is **NOT**
  - separate budgets for women and men
  - equivalent spending for women and men
  - incompatible with rights-based budgeting
- **Aims to be**
  - participative
  - more democratic
  - open and accessible government
  - analytical and progressive
  - effective policy making



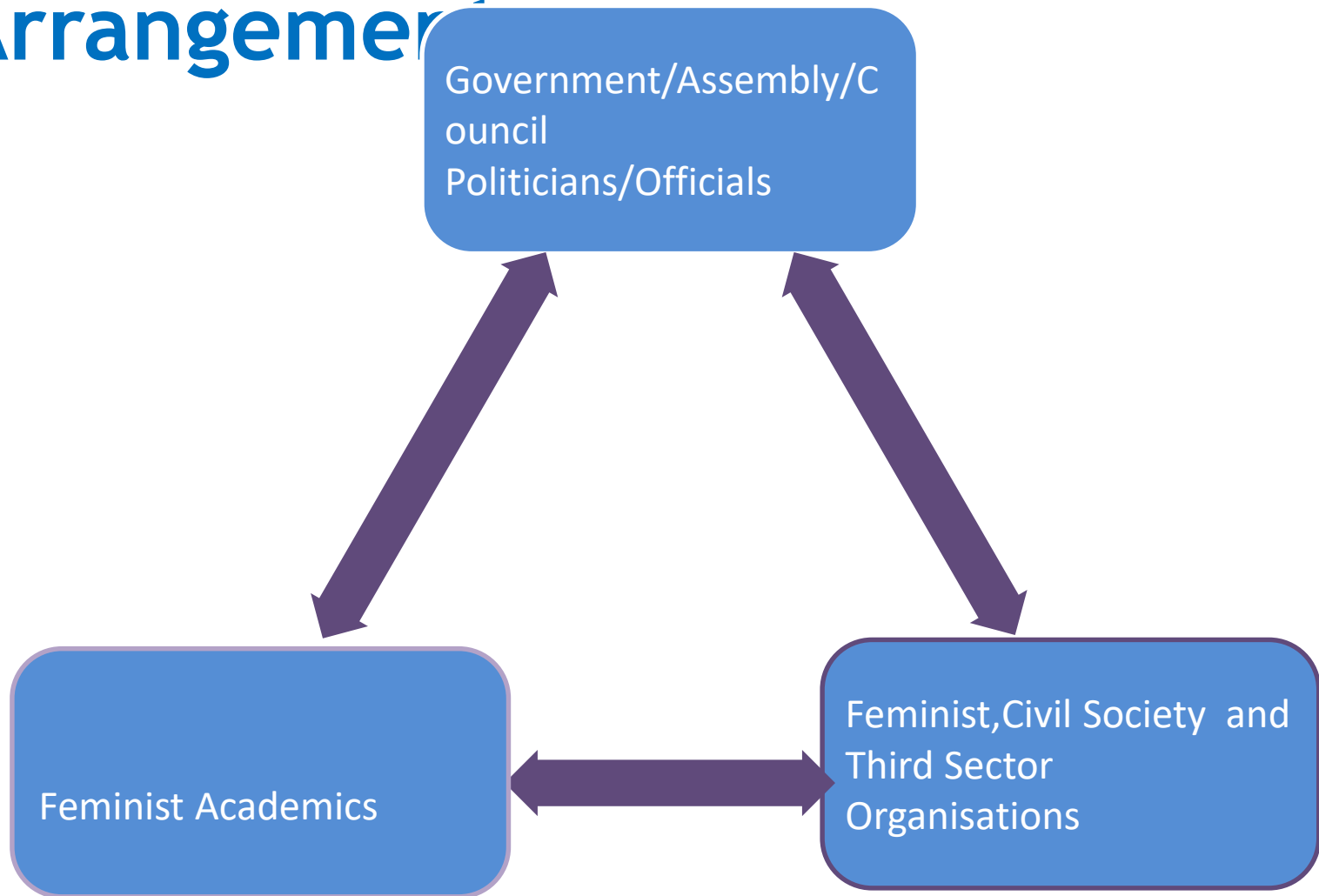


The budget “reflects the values of a country - who it values, whose work it values and who it rewards ... and who and what and whose work it doesn’t”  
(Pregs Govender, in Budlender 1996, p.7).

# Some Key Sex Disaggregated Indicators

- Women's share of public sector employment and of private sector employment
- Gender wage gap in public sector and private sector
- Median earnings for women and men
- Median individual income, after taxes and benefits, of women and men
- Share of income made up of welfare benefits, for women and men
- Average hours of unpaid care work, for women and men
- Use of public services, by women and men

# Engaged Actors and Institutional Arrangements

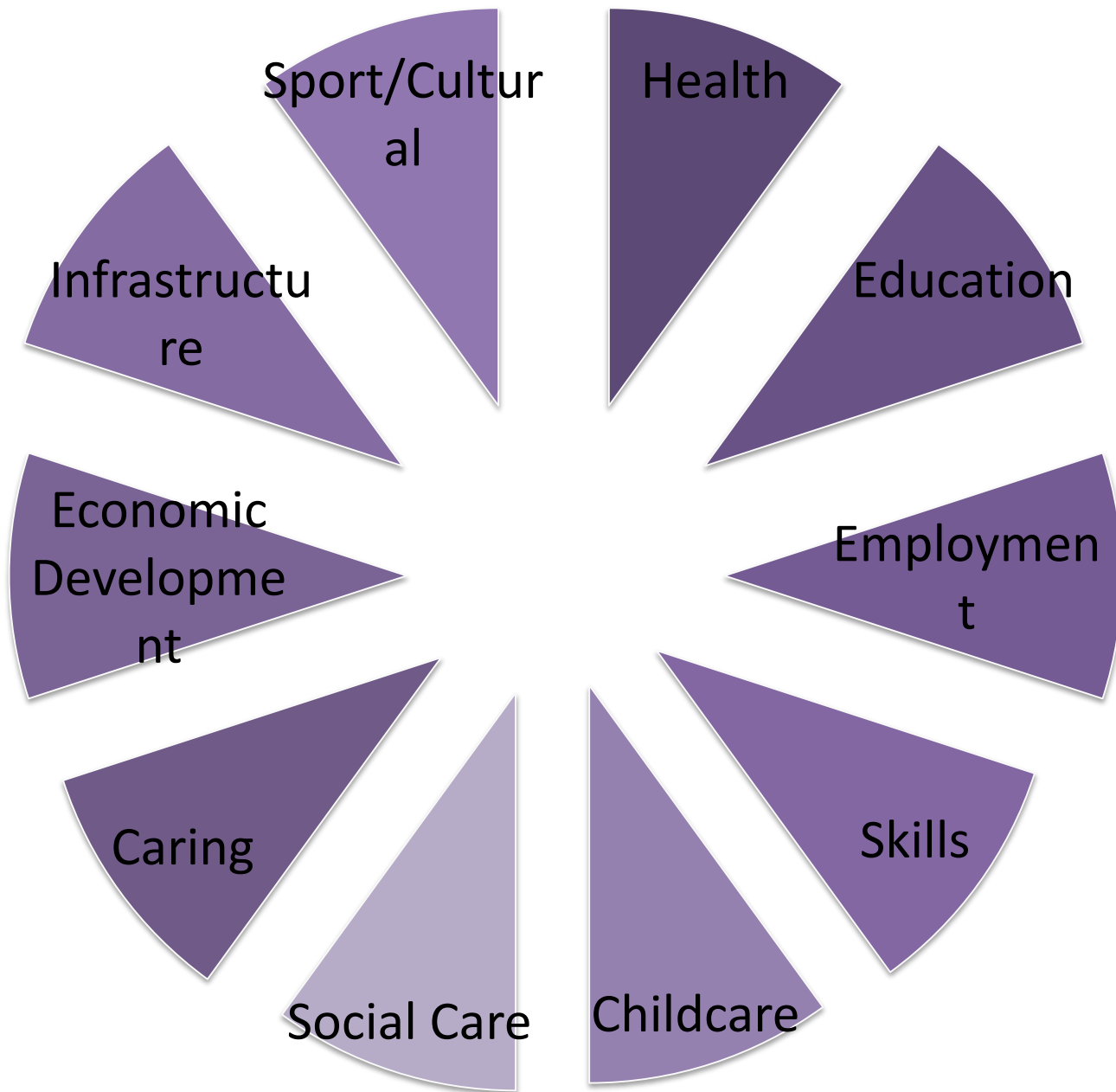


# What Kind of Analysis Can Be Done Outside Government?

- Bring together information about policies put forward in budgets with information about gender differences to examine likely gender impact on employment, earnings, incomes, unpaid work etc
- Use data from labour force and household surveys
- Request administrative data for government agencies
- Use case studies conducted by academics and NGOs
- Publish reports
- Engage with media, officials, politicians
- Examples: UK Women's Budget Group, Scottish Women's Budget Group, South African Women's Budget Project

# Budgets and Healthy Lives

- What policy domains implicated?
- What areas of resource allocation or revenue raising are of interest?



# Scottish Government Budget

☐ Cash terms 
 ☐ Real terms\* 
 ☒ Share of the budget/portfolio

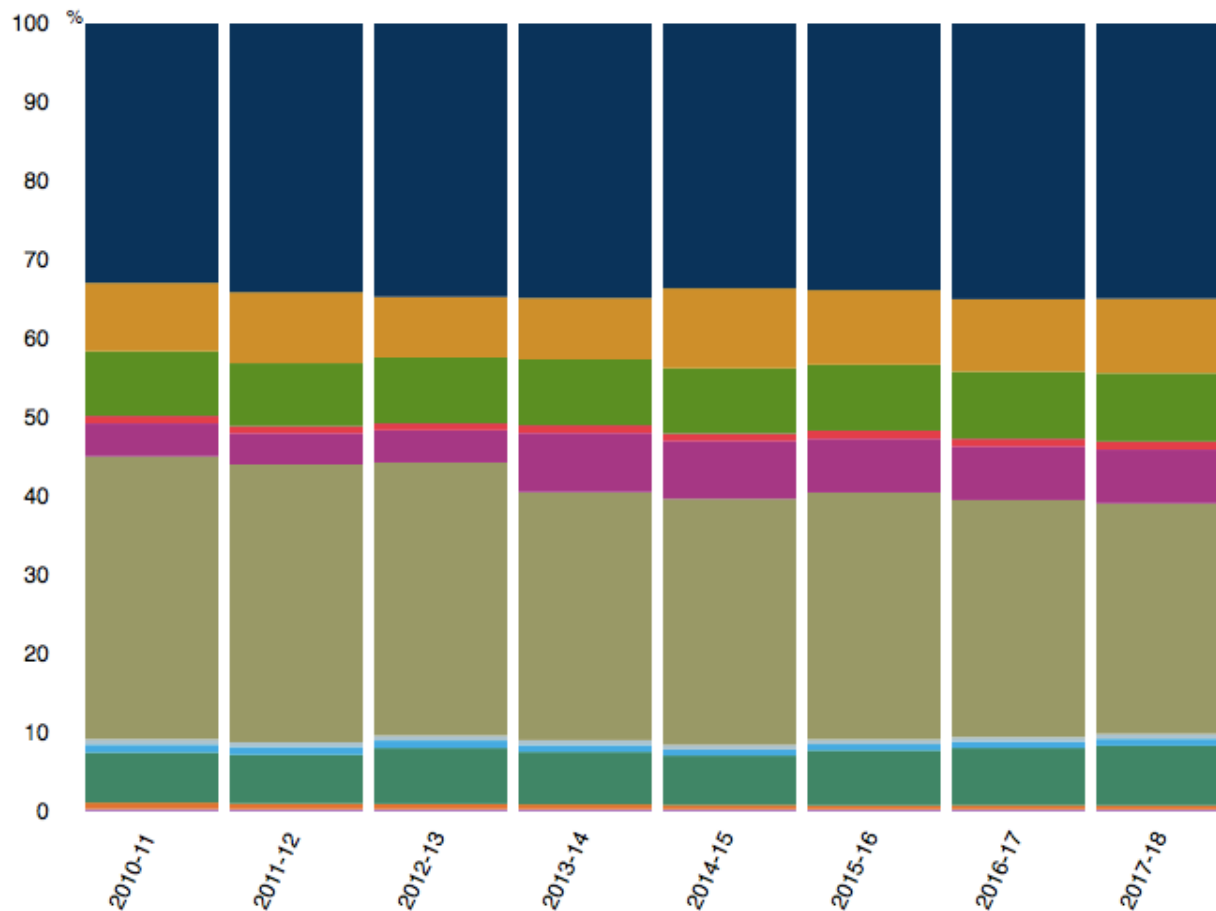
\*Real terms based on 2016-17 prices.

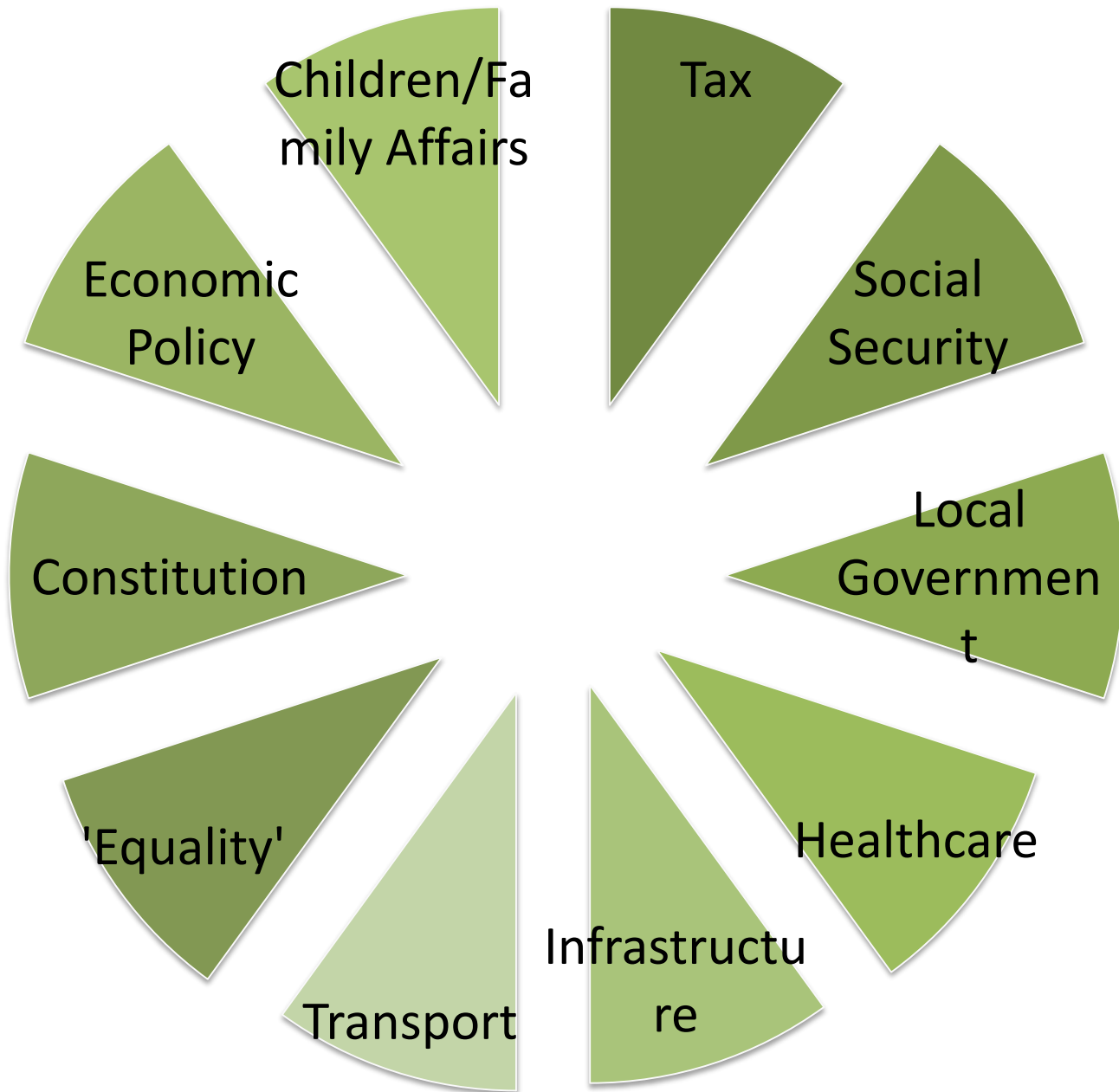
☐ Grouped 
 ☒ Stacked



## Portfolios

- ☒ Select all
- ☒ Health and Sport
  - ☒ Finance and the Constitution
  - ☒ Education & Skills
  - ☒ Economy, Jobs and Fair Work
  - ☒ Justice
  - ☒ Communities, Social Security and Equalities
  - ☒ Environment, Climate Change and Land Reform
  - ☒ Culture, Tourism and External Affairs
  - ☒ Rural Economy and Connectivity
  - ☒ Administration
  - ☒ Crown Office and Procurator Fiscal Service



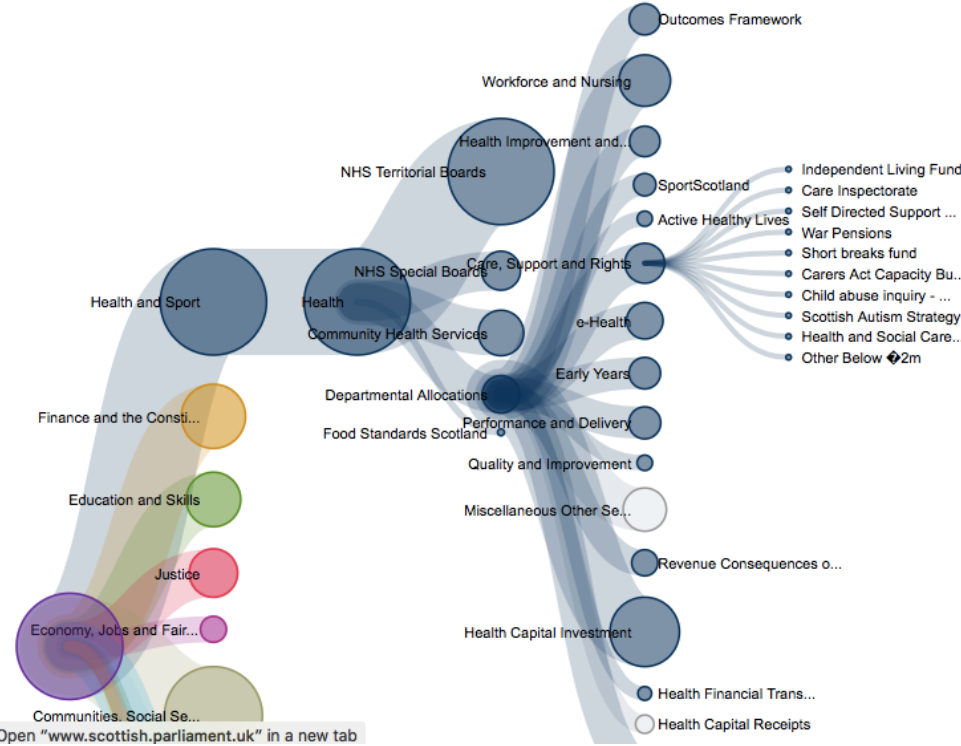






# Scottish Government Draft Budget 2018-19 ⓘ

View the budget as: ☒ 2018-19draft (cash) ☐ % change on 2017-18 (cash)  
☐ % change on 2017-18 (real)



Open "www.scottish.parliament.uk" in a new tab

Search... ✕

## Health and Sport

	£ Million
2018-19 Draft Budget:	13,599.0
2018-19 Draft Budget: (in 2017-18 prices)	13,400.7
2017-18 Draft Budget:	13,225.9

### Change 2018-19 on 2017-18:

	cash	real
percent	2.8%	1.3%
absolute	373.1 m	174.8 m

How does this budget compare?  
(% change in cash terms)

- 3.2% L0: Scottish Budget
- 2.8% L1: Health and Sport

Thank you for your attention.

# Useful resources

- UK Women's Budget Group - <https://wbg.org.uk/resources/gender-responsive-budgeting-resources/>
- Gender Budgeting in Europe: Developments and Challenges, eds. Angela O'Hagan and Elisabeth Klatzer. Palgrave Macmillan. 2018
- Gender Budgeting in Scotland: A work in progress', *Administration* Vol (65), pp.17-39  
<https://www.degruyter.com/view/j/admin.2017.65.issue-3/issue-files/admin.2017.65.issue-3.xml>
- Gender Budgeting in Scotland: Towards Feminist Policy Change  
[https://www.gcu.ac.uk/wise/media/gcalwebv2/theuniversity/centresprojects/wise/93248\\_WiSEBriefingSheet\\_Dec2015\\_05.pdf](https://www.gcu.ac.uk/wise/media/gcalwebv2/theuniversity/centresprojects/wise/93248_WiSEBriefingSheet_Dec2015_05.pdf)
- 'Integrating economic and social policy: childcare - a transformational policy? Gary Gillespie and Uzma Khan' in Jim Campbell and Morag Gillespie (eds). *Feminist Economics and Public Policy: Reflections on the work and impact of Ailsa McKay*. Routledge IAFFE Advances in Feminist Economics, Routledge. 2016.



# Uzma Khan

# The Scottish Approach to Inclusive Growth

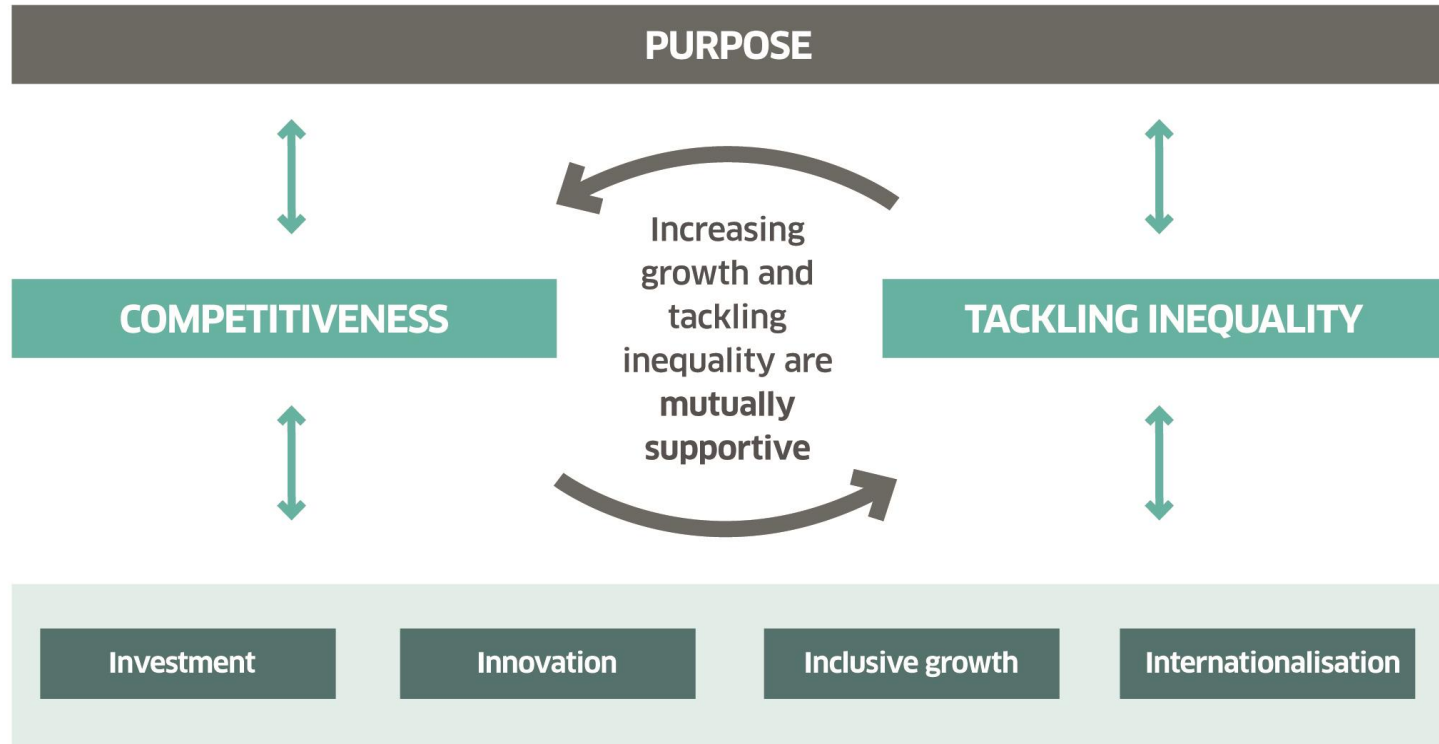
*Lessons for Gender Budgeting?*



Scottish Government  
Riaghaltas na h-Alba  
gov.scot

# Scotland's Economic Strategy 2015

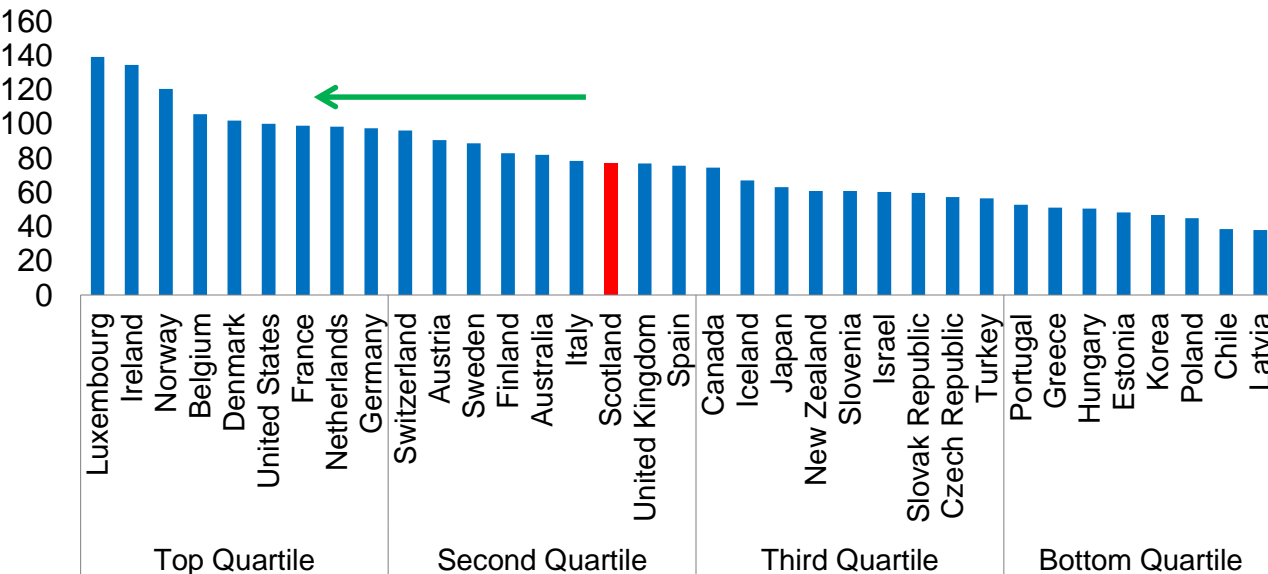
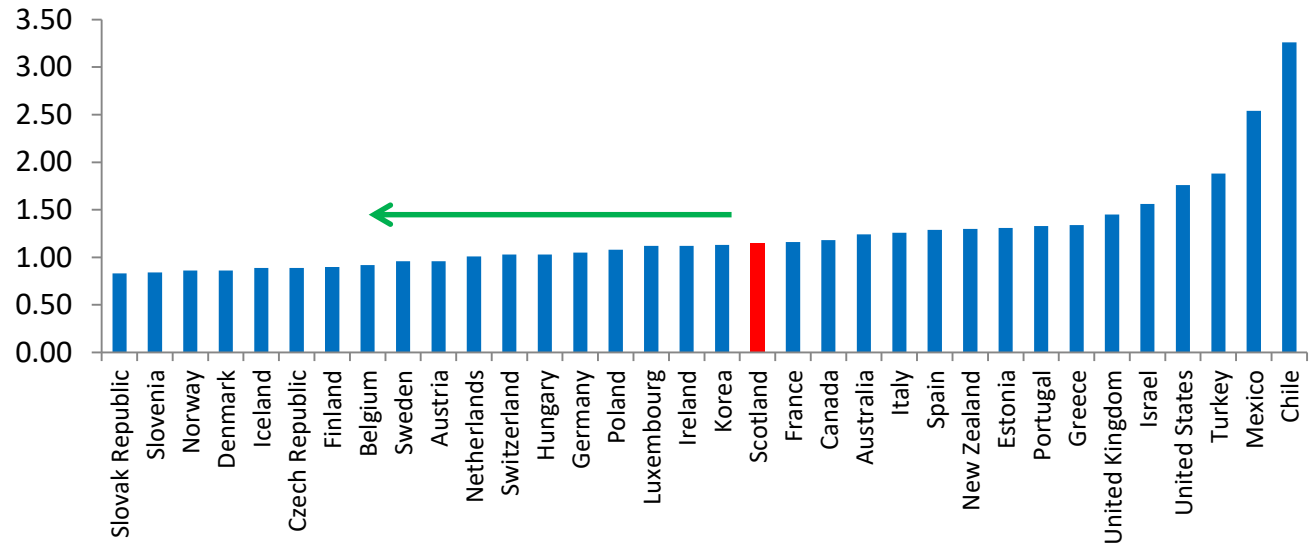
## SCOTLAND'S ECONOMIC STRATEGY



# Our ambitions – in an international context

## Inequality:

In terms of the Palma ratio, Scotland would rank 19<sup>th</sup> out of the OECD countries for income inequality.



## Productivity:

Scotland is currently ranked in the middle of OECD countries in terms of GDP per hour worked.



# Inclusive Growth challenges – a shared responsibility



Scotland is a wealthy country, with comparable GDP per head than the UK



Poverty is projected to rise, particularly amongst households with children



The gap in pay between men and women has fallen considerably



Women still get paid less than men. For every £1 a man earns, a woman earns 84p.



We are living longer, healthier lives



People from our most deprived areas live on average 10 years less than those in our least deprived areas



We have a high employment rate



Employment differs significantly between groups (Employment overall is 74.9%, but for minority ethnic women is 45% and disabled people 43%.

- Outcomes are markedly different for certain groups
- This impacts social cohesion and the performance of the economy and we need to address these constraints to improve the economy and wellbeing.



## So what is inclusive growth?

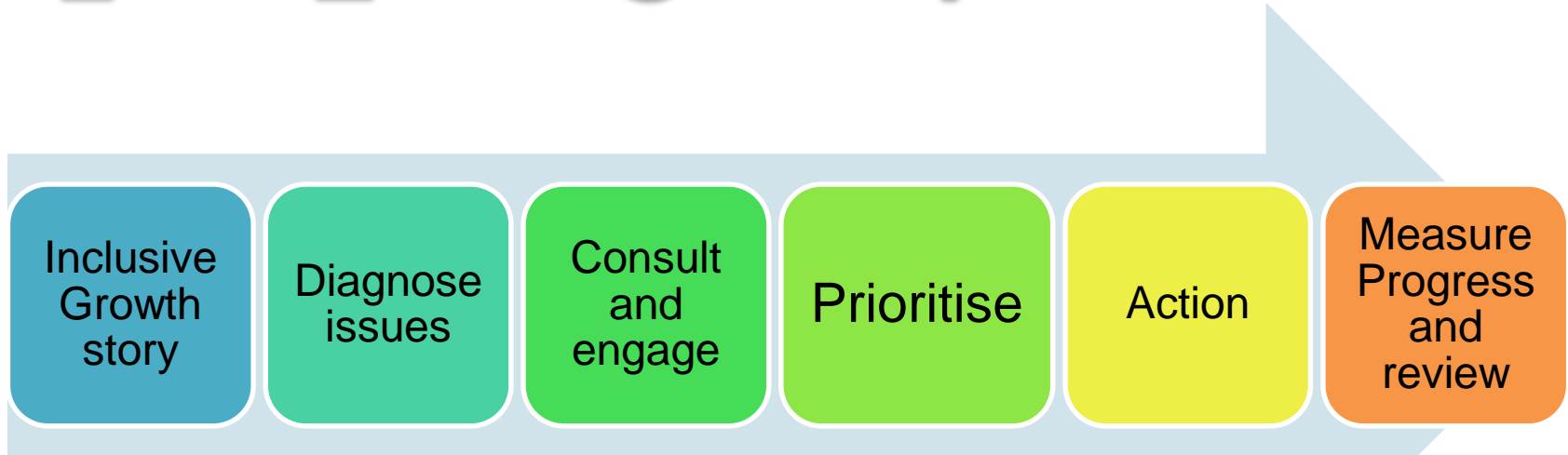
“Growth that combines increased prosperity with greater equity; that creates opportunities for all and distributes the dividends of increased prosperity fairly”

**Scotland (SES)**

- Incorporates traditional growth policies: investment, innovation, internationalisation, labour markets and employment
- Is multi-dimensional: it includes social inclusion, well-being, participation, environmental
- Tackles inequalities in outcomes but also inequalities in opportunities
- Promotes more equal growth across cities, regions and rural areas, and recognises importance of place/community in delivering this.

# Our six-stage approach to delivering inclusive growth outcomes

1 ↔ 2 ↔ 3 ↔ 4 ↔ 5 ↔ 6



## ACTIVITIES

Benchmarking  
of IG  
indicators

Understand  
root causes:  
'3 levels'

Consultation  
with  
stakeholders

Prioritisation:  
identify key  
criteria/groups

Policy  
Alignment

Monitoring  
& Evaluation

Young people

Long-term  
health  
problems

Those  
experiencing in-  
work poverty

Women

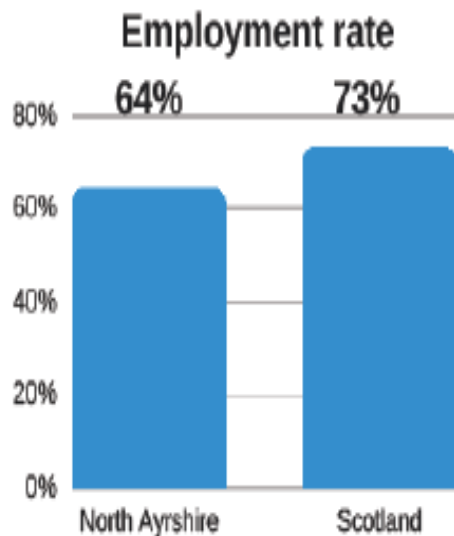
# The North Ayrshire Inclusive Growth Pilot



*Delivering our services with*  
Focus. **Passion.** **Inspiration.**

# Stage 1: Benchmarking against inclusive growth indicators

Inclusive  
Growth  
story



Current population is 136,100  
But projected to fall 9% by 2037



Nearly 1 in 3 children in  
North Ayrshire are living  
in poverty (30.5%)



£63,631  
Average income of wealthiest North  
Ayrshire datazone



£14,935  
Average income of poorest North  
Ayrshire datazone

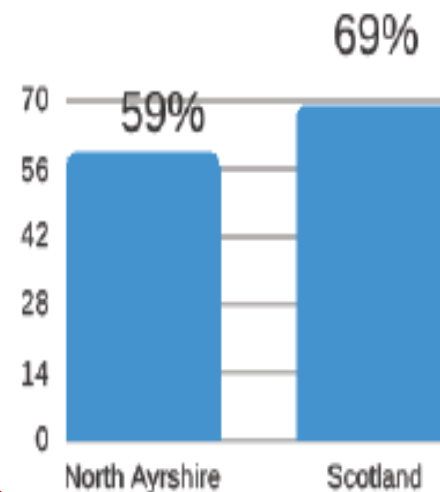


35% are qualified to NVQ4+  
Scotland figure is 44%



32% public sector jobs

**Women's employment rate**

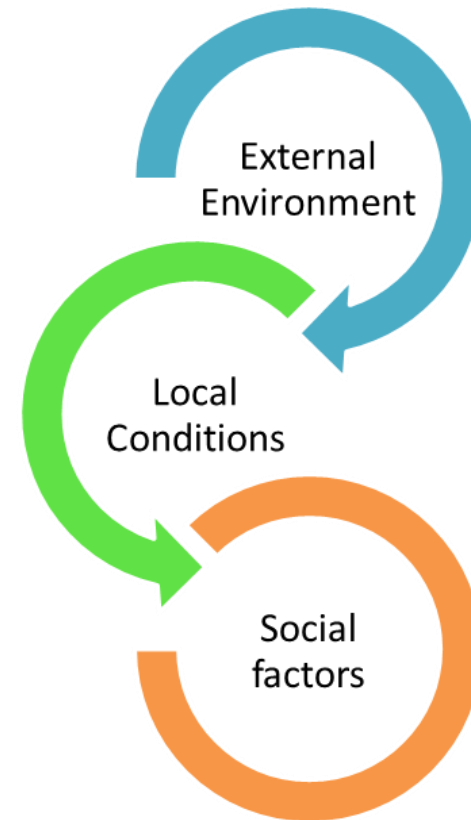


## Stage 2: The 'Diagnostic' approach

Diagnose  
issues

Three levels of consideration:

- ❑ The external environment - what is shaping opportunities for an area?
- ❑ Local conditions that are determining the opportunities of the local population at each stage of life; and,
- ❑ Social factors which act to compound an individual's experience of inclusive growth.

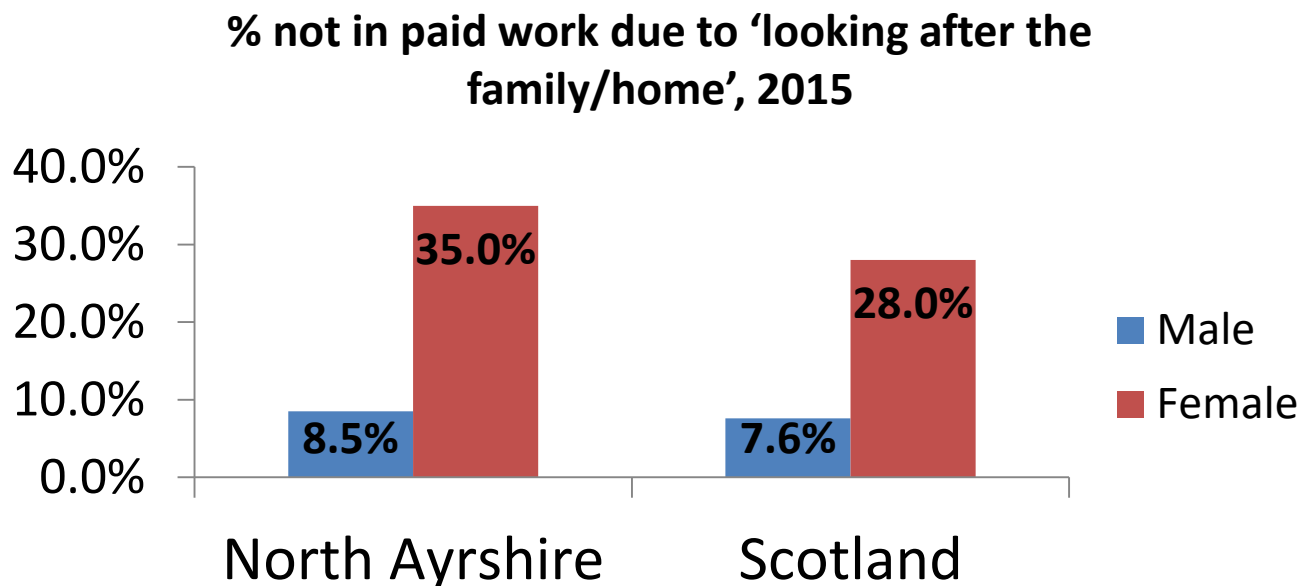
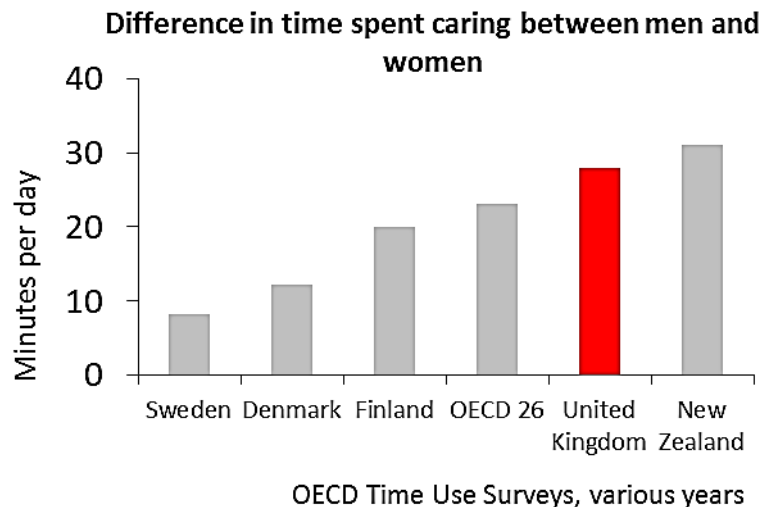


## Stage 2: What is impacting on Inclusion in North Ayrshire?

*We started with economic participation for women – key to inclusive growth*

Diagnose  
issues

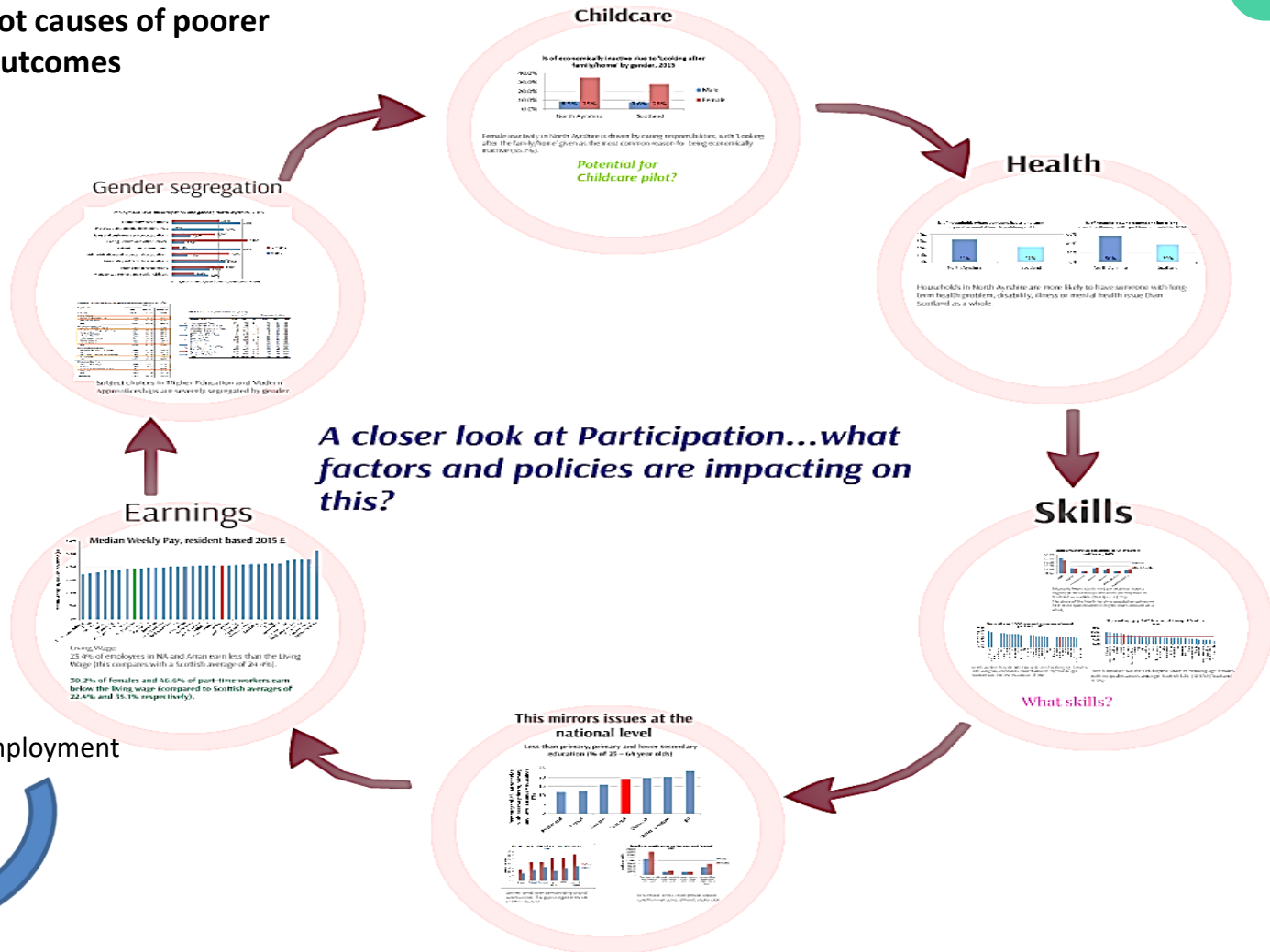
- Childcare provision, particularly after-school provision a key issue for NA residents
- 35% of women are not in paid work due to caring responsibilities in NA, compared to 28% in Scotland as a whole.



# And then took a 'whole-system' approach...

Diagnose  
issues

What is driving low participation;  
What are the root causes of poorer  
labour market outcomes

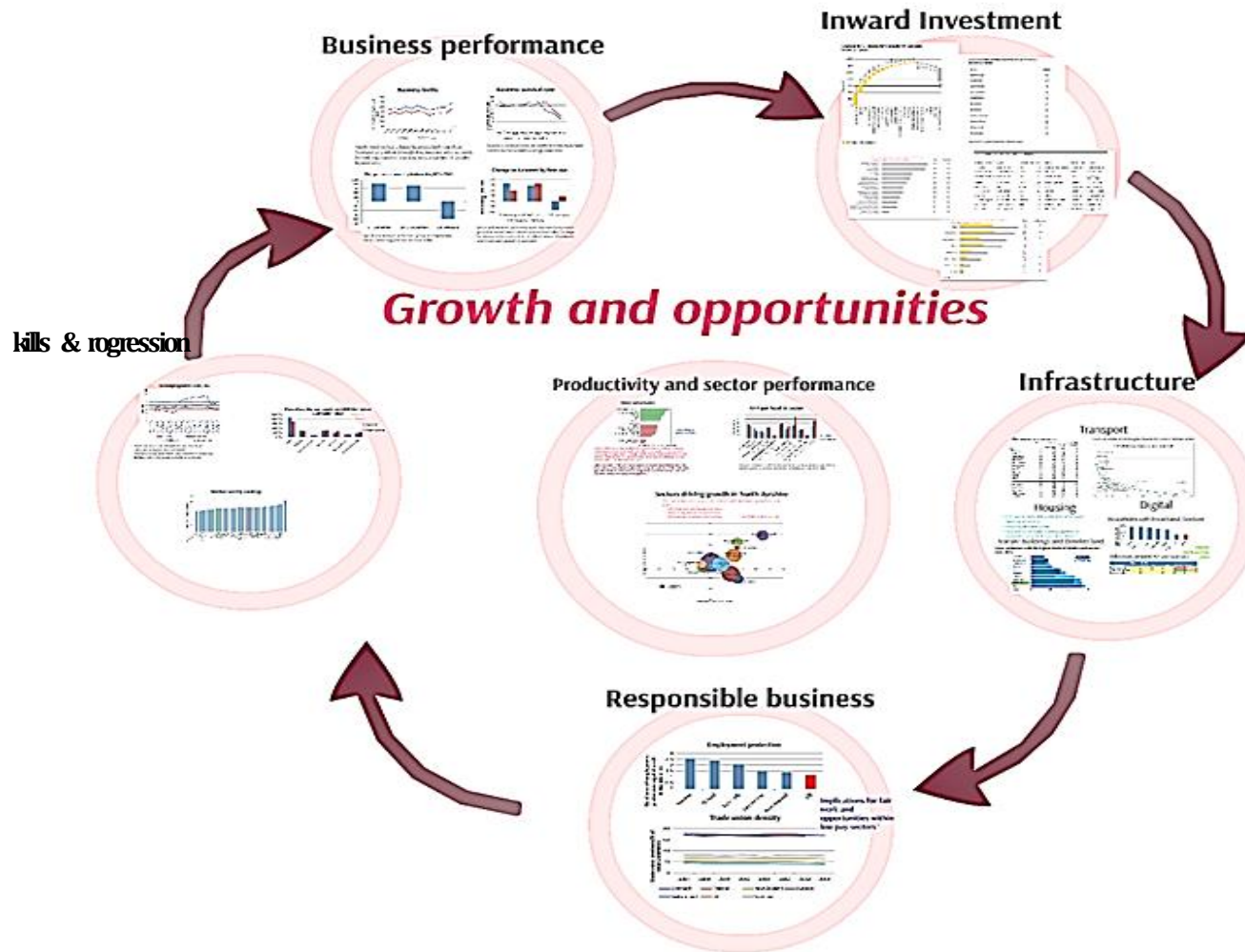




## Stage 2: What is impacting on growth in North Ayrshire?

*A need to balance 'both sides' of the equation*

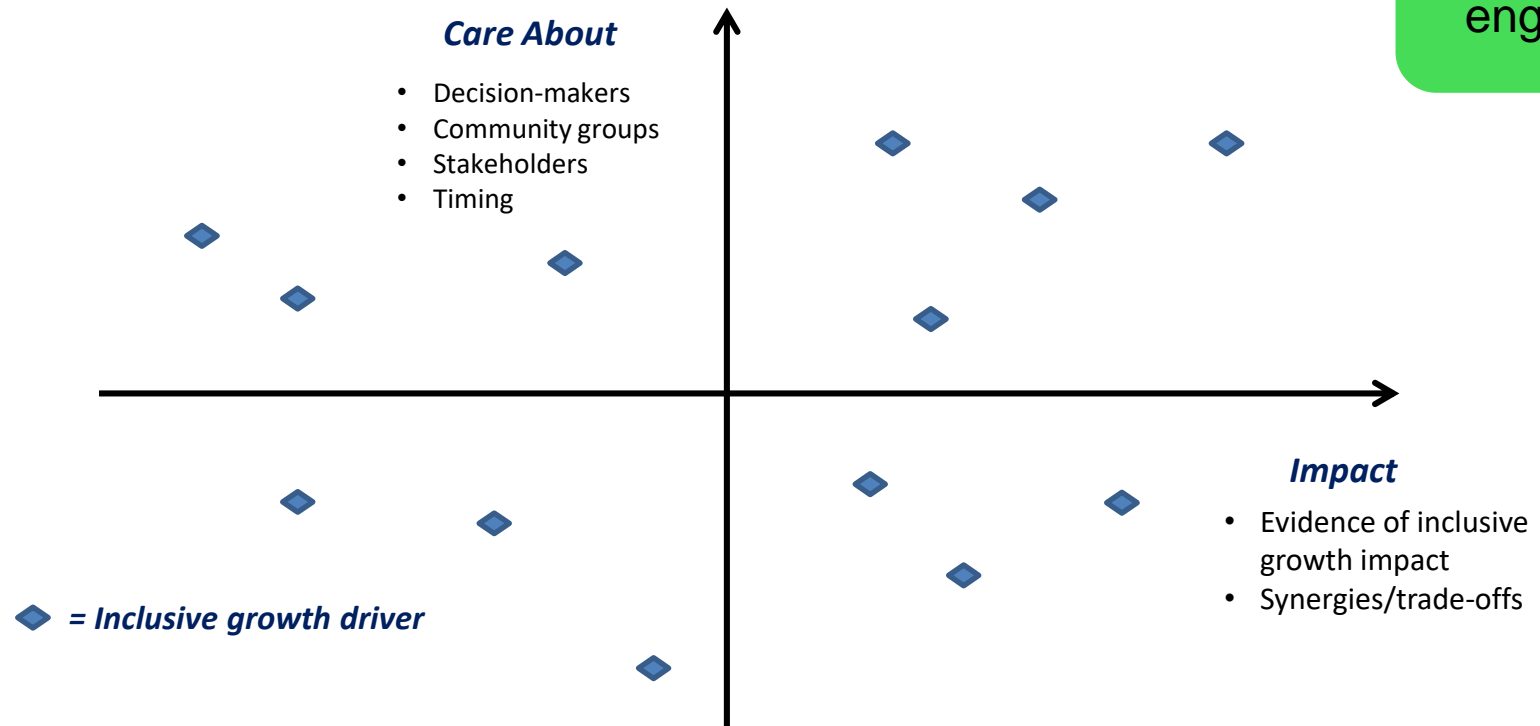
Diagnose  
issues





# Stages 3 & 4: Consultation and Prioritisation

Consult  
and  
engage



- The prioritisation exercise ranks the identified constraints based on the interaction of two dimensions: **impact** (evidence-based approach) and **care about/deliverability** (qualitative assessment led by NA decision makers building on community engagement).

## Impact

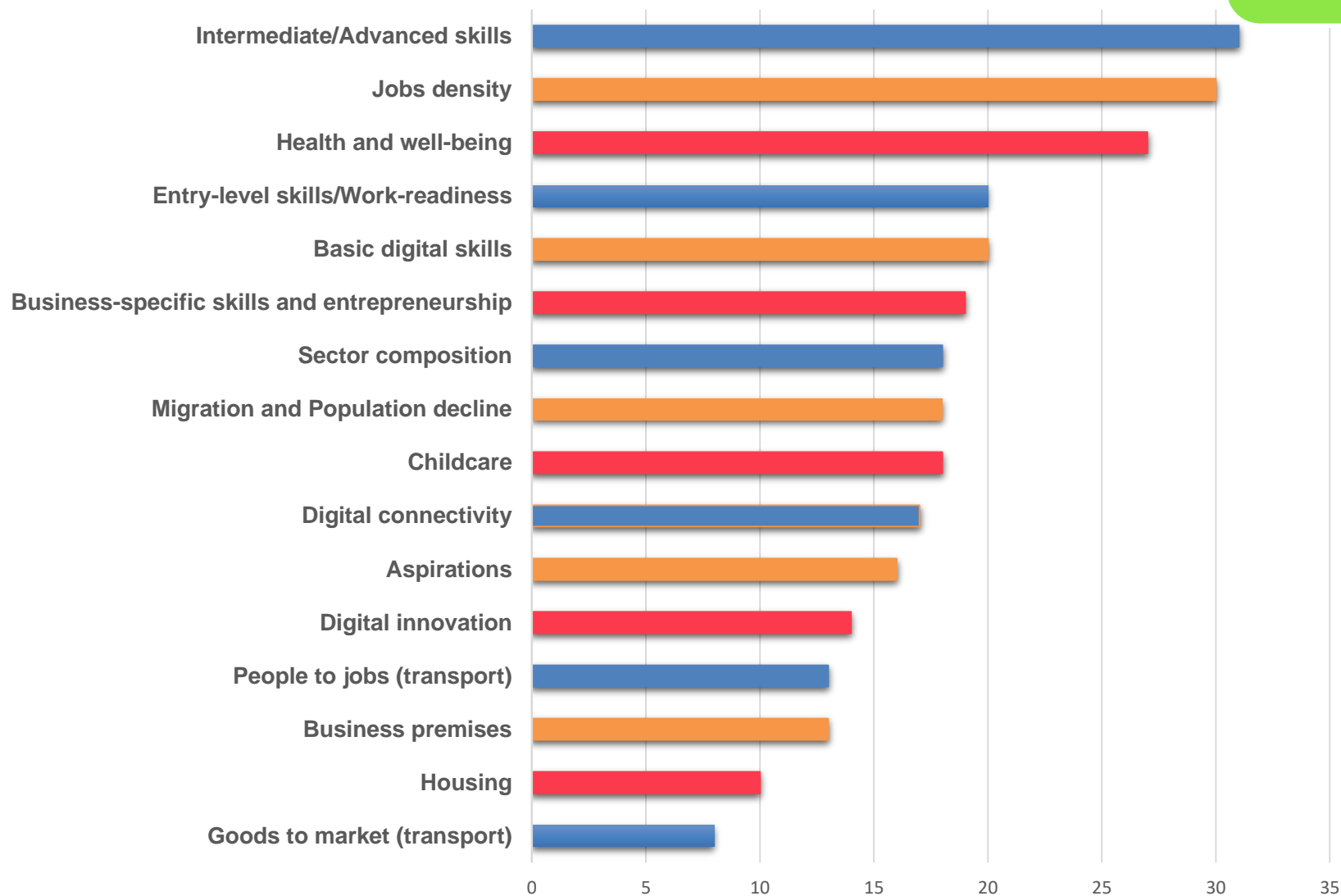
Constraint	Inclusion		Growth		Sustainability		Trade-off	Ranking
	Impact	Evidence	Impact	Evidence	Impact	Evidence	Synergies	
X	Large	Strong	Small	Strong	Medium	Weak	Positive	1
Y	Medium	Weak	Medium	Weak	Large	Weak	Negative	2
Z	Small	Strong	Medium	Medium	Small	Weak	Neutral	3

## Care About

Constraint	Preference of key groups	Time Dimension		Funding	Care about ranking
		Time for constraint to be eased	Time once constraint eased for impact to be felt on inclusive growth		
X	High	Short Term	Medium Term	Medium	1
Y	Medium	Medium Term	Long Term	Low	2
Z	Low	Long Term	Long Term	High	3

## Stage 4: Prioritisation

Prioritise



## Stage 5: Implementing the findings

### Action

- Findings from the Diagnostic to inform the development of strategies and programmes, including Community Planning Partnership 'Fair for All' Strategy to reduce inequalities in North Ayrshire and its associated 'Pledges'.
- Council's March 2017 budget made a significant investment to take forward the North Ayrshire Fair for All Strategy. Investment funds created include:
  - Community Investment Fund;
  - Poverty Challenge Fund;
  - Basic Income Pledge;
  - Participatory Budgeting Fund;
- Incorporating findings into North Ayrshire's ongoing and new Employability programmes: including a programme tailored to single parents and working with Health colleagues to implement a Health Visitor scheme.
- Findings, particularly excluded groups (young, ill-health, women), will inform design of the NA Basic Income pilot, in partnership with three other Scottish local authorities, supported by the Scottish Government.

- **Scotland's Inclusive Growth approach embeds some fundamental principles of gender budgeting because:**
  - Inclusive growth begins with considering outcomes of *specific* groups and businesses to address national growth ambitions
  - It seeks to understand root causes of underperformance – helps to challenge existing assumptions about what drives success in an economy
  - It can inform spend priorities from a gender-perspective
- **Potential future steps...and new ideas?**
  - Identify inclusive growth priorities (national, regional, local)
  - Assess the size of **gender gap** for each of these priorities
  - Design policies to address constraints, being mindful of scale of interventions/proportion of costs to address the gap
    - Redistribute budgets accordingly.....

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**THANK YOU**

**Dr Mary-Ann  
Stephenson**

# Local and intersectional

## Work of the Women's Budget Group and Coventry Women's Voices

Budgetary Impact Analysis: A Catalyst for Economic Growth

Belfast 14 May 2018

Mary-Ann Stephenson

[www.wbg.org.uk](http://www.wbg.org.uk)

## About the Women's Budget Group

- The Women's Budget Group (WBG) is a network of leading academic researchers, policy analysts and activists
- Set up in 1989 to analyse UK government economic policy for its impact on women and to promote policies that will increase gender equality.
- Our vision is of a gender equal society.
- Our mission is to promote greater gender equality in policy making and raise awareness of feminist approaches to economics.



## About Coventry Women's Voices

- Coventry Women's Voices is a network of women's voluntary organisations, trade unions and individual women that was formed in 2010 to make sure women's voices are heard when policy is made in Coventry.
- Launched with a large consultation forum attended by 80+ women.
- Consultation agreed two areas of focus: violence against women and impact of austerity policies following 2010 Emergency Budget

## Why local?

- Central government funding for local government:
  - fell by over 50% between 2010/11 and 2015/16
  - Fell by a further 30.6% in 2017/18.
- Pattern of cuts has varied
  - Average cuts in most deprived areas: £222 per head
  - Average cuts in most affluent areas: £40 per head
- Political choices have varied
- Local detail can 'humanise' in a way that national numbers cannot

## Intersectional analysis

- Gender inequality intersects with other forms of inequality based on class, race, disability and so on.
- This means that economic policies will not only impact differently on women and men; they impact differently on Black women, disabled women, working class women
- For example BAME women in poorest families hit hardest by tax/benefit changes



*'there are real risks that women, ethnic minorities, disabled people and older people will be disproportionately affected'*

## House of Commons Library analysis for Yvette Cooper

Women will bear brunt of budget cuts, says Yvette Cooper

**Detailed audit shows women to shoulder three-quarters of cuts**



- 70% of revenue from tax and benefit changes from women's purses
- £8bn by 2014/15
- £5.8bn from women
- £2.2bn from men

# WBG Gender Impact Assessment of the Coalition Government Budget, June 2010

*‘our verdict is that while the budget has a few individual measures that help to offset gender inequality, such as the exemption of low income workers from the public sector pay freeze, the budget taken as a whole is unfair in its impact on women as compared to men’.*

*‘Low income mothers, who are the managers and shock-absorbers of poverty, will be among the main losers. Women from black and minority ethnic groups will be particularly hard hit, as 40 per cent of them live in poor household’*

*‘Women tend to be harder hit than men by spending cuts because women use public services more intensively than men .....Women are also the ones who are likely to pick up the extra unpaid work that cuts in public services will entail’*



CHRP had developed a methodology for impact assessment

CWV wanted to find out about local impact (was a projection as most cuts had not yet happened)

Used WBG analysis of likely impact, plus local data (benefit claims, average local rents, job and service cuts)

Interviewed front line organisations about likely impact

Took an intersectional approach

## Unravelling Equality?

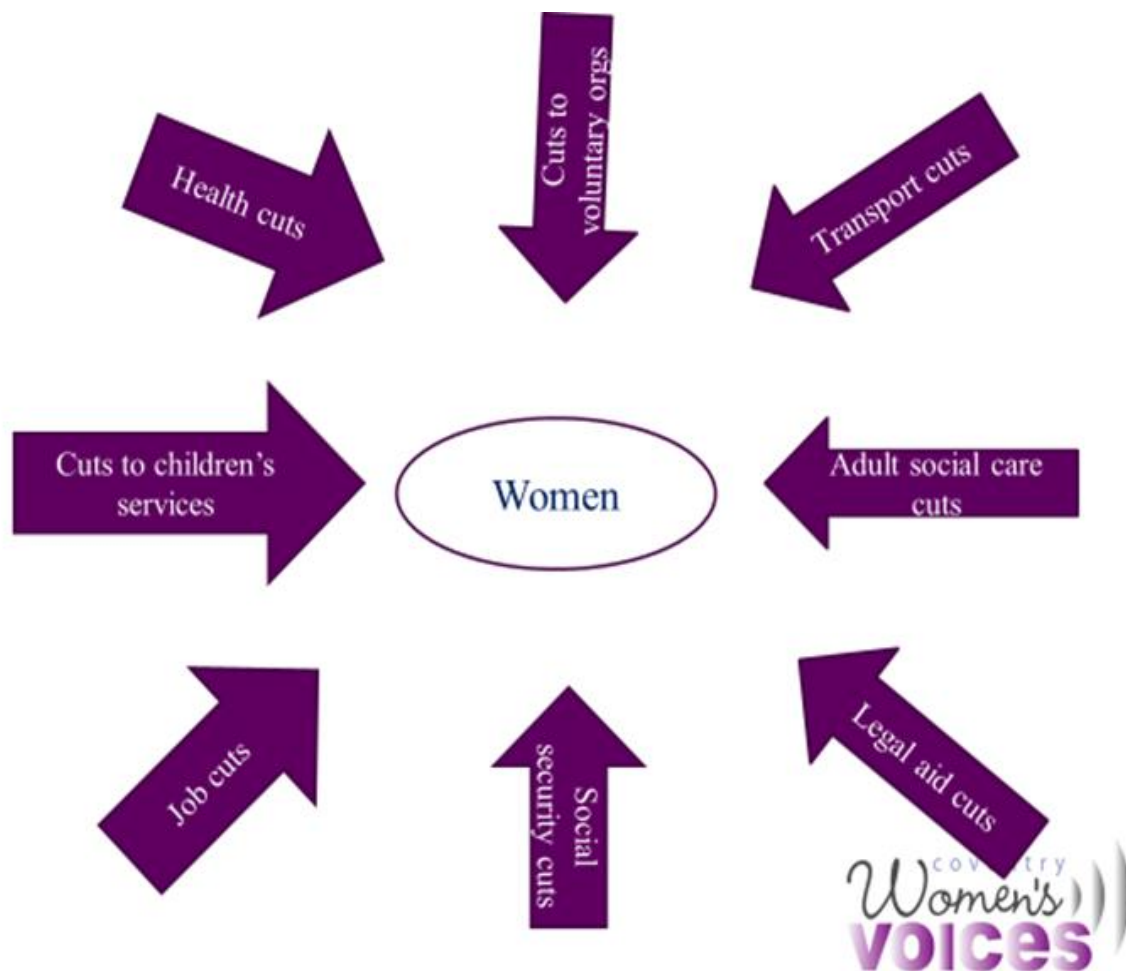
A Human Rights and Equality Impact Assessment of the Public Spending Cuts on Women in Coventry.

A Joint Report of the Centre for Human Rights in Practice,  
University of Warwick and Coventry Women's Voices  
By Mary-Ann Stephenson and James Harrison



Warwick | Law School





Looked at cumulative impact

Also at how cuts in one area could impact unexpectedly in another





## Getting off Lightly or Feeling the Pinch?

A Human Rights and Equality Impact Assessment of the  
Public Spending Cuts on Older Women in Coventry

A Joint Report by the Centre for Human Rights in Practice, University of Warwick and Coventry Women's Voices  
By Mary-Ann Stephenson with James Harrison and Ann Stewart  
July 2012



Warwick | Law School

THE UNIVERSITY OF  
WARWICK

CWV was concerned about lack of gender analysis of claim that older people had 'got off lightly' from austerity

Once cuts to services taken into account many older women were losing a great deal

Cuts had started so interviewed older women as well as service providing organisations

Again took an intersectional approach, e.g. looking at impact on older Asian women who did not have English as a first language



## Layers of Inequality

A Human Rights and Equality Impact Assessment of the Public Spending Cuts on Black Asian and Minority Ethnic Women in Coventry

A Joint Report of Coventry Women's Voices, Coventry Ethnic Minority Action Partnership, Foleshill Women's Training and the Centre for Human Rights in Practice, School of Law, University of Warwick  
By Kalwinder Sandhu, Mary-Ann Stephenson and James Harrison



Previous reports had identified BME women as particularly vulnerable to cuts to benefits and services

Worked in partnership with BME organisations to carry out interviews and focus groups

Major barrier was lack of data disaggregated by both gender and ethnicity

Both national and local data was available by gender, or ethnicity but not both

Intersecting inequalities

**The impact of austerity on  
Black and Minority Ethnic  
women in the UK**



A report by the Women's Budget Group and Runnymede Trust  
with RECLAIM and Coventry Women's Voices

WBG publishes annual assessments of Budget and Financial Statement each year.

Wanted an analysis that was cumulative (to show how the impact of a series of cuts)

Analysed all changes from 2010 projected to 2020

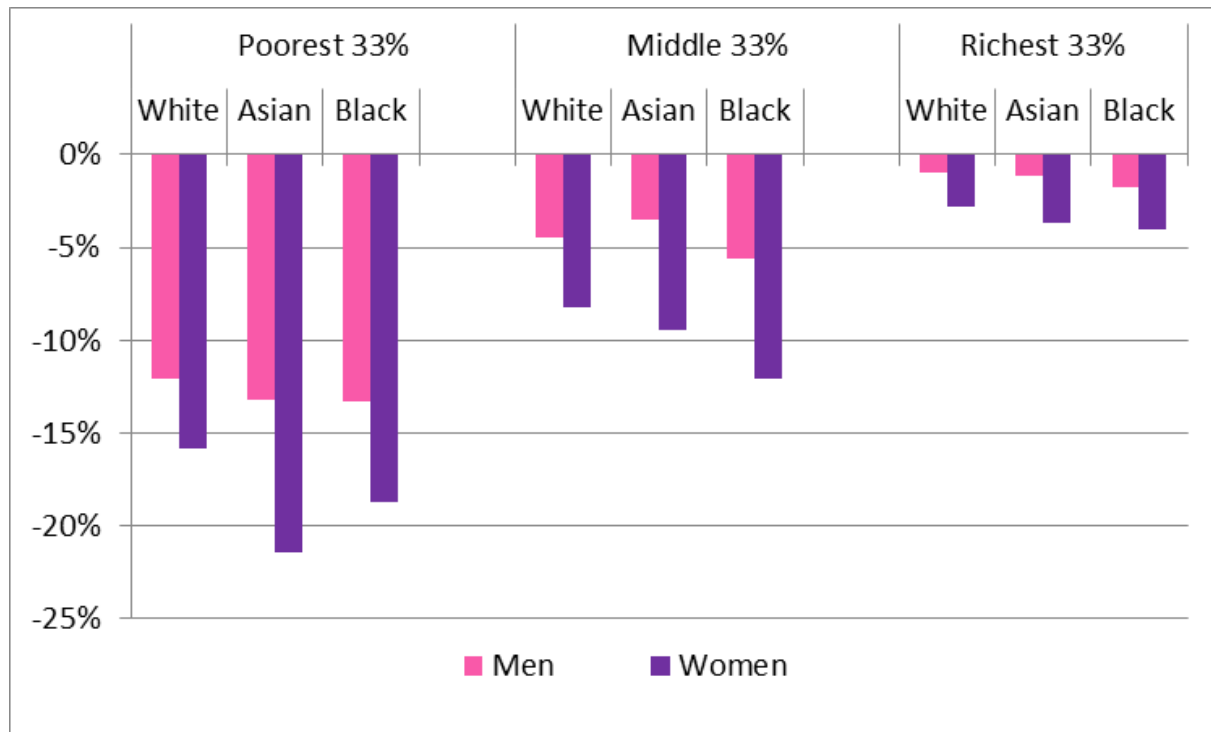
Distributional impact analysis with Landman Economics

Qualitative research with women in Coventry and Manchester in partnership with Coventry Women's Voices and Reclaim

# Methodology for distributional impact analysis

- Uses tax-benefit model (IPPR/Resolution Foundation/Landman Economics) and public spending model (Landman Economics)
- The tax-benefit model uses data from the UK Family Resources Survey and Living Costs and Food Survey to calculate the impact of changes to direct and indirect taxes, benefits and tax credits/Universal Credit on net incomes at the household, family and/or individual level
- Public spending model uses data on real-terms spending per household on different service areas (e.g. Health, education, social care, transport etc) combined with household and individual-level data on service usage from a range of different surveys to model the impact of changes in public spending on living standards
- A static model, assuming no behavioural impacts

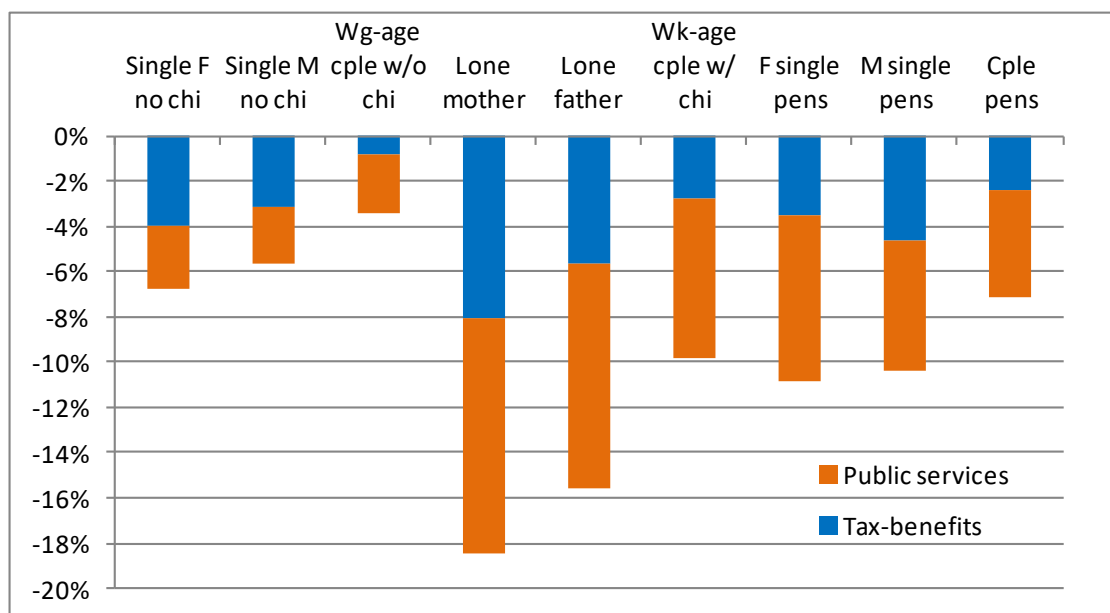
## 2010-21 cumulative individual impact of changes in taxes and benefits (percentage of net individual income per annum by April 2021) by household income groups, gender and ethnicity



Source: WBG calculations using Landman Economics tax-benefit model – base: all adults

- Cuts are regressive – hit the poor hardest
- Women hit harder in each income group in cash terms as % of income
- BME women hardest hit

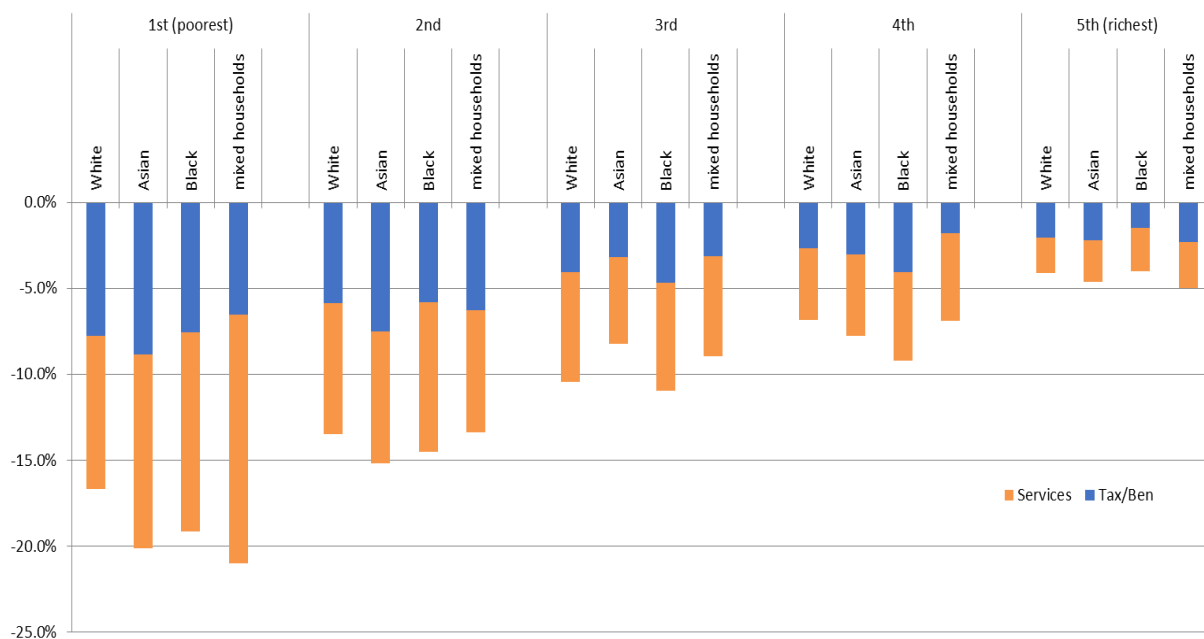
## Cumulative real-term change in taxes, cash benefits and the value of public services by gendered household type (% of living standards, 2010-20)



Source: WBG calculations using Landman Economics tax-benefit and public spending models

- **Service cuts more drastic** than tax-benefit changes
- Single female-headed households hit harder
- **Lone mothers** lose out £9000, 20% of their living standards (disposable income + value of service)
- 63% of the cuts borne by **single female pensioners** are from social care (despite precept)

## Cumulative real-term change in taxes, cash benefits and the value of public services by income and ethnicity (% of living standards, 2010-20)

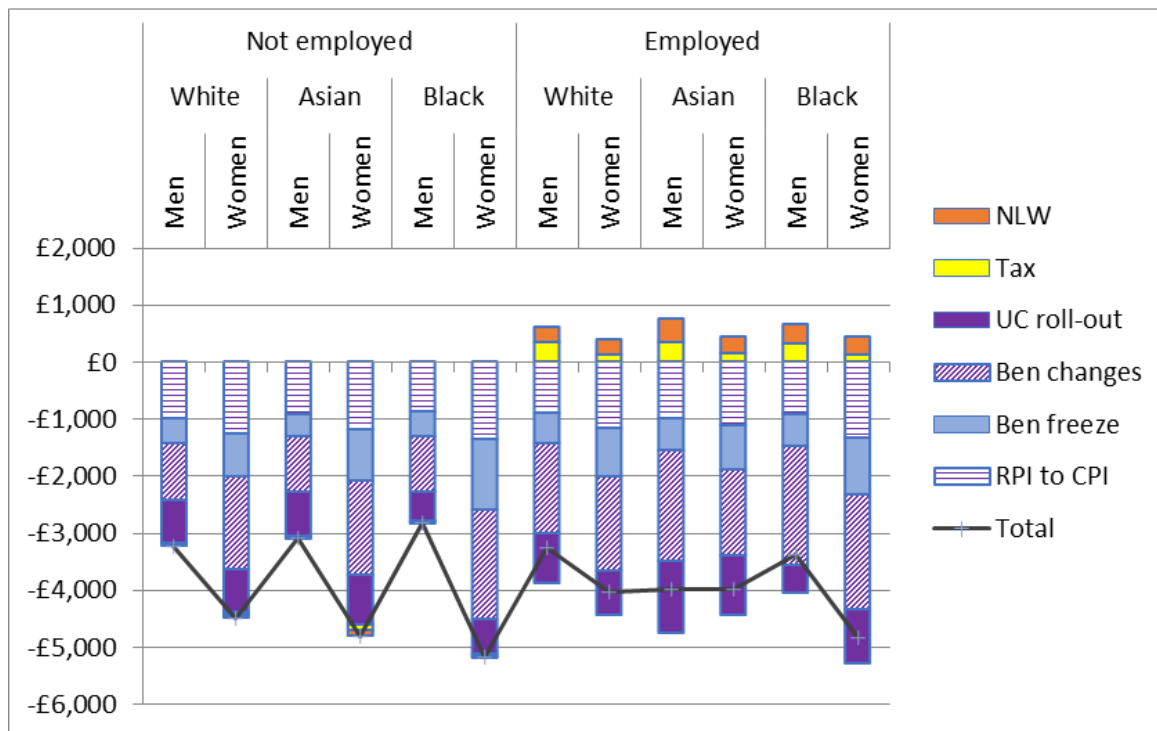


- Black and Asian households with the lowest fifth of incomes will experience an average drop in living standards of 19.2% and 20.1%
- This equates to a real times average loss of living standards of over £8,400 and over £11,600

Source: WBG calculations using Landman Economics tax-benefit and public spending models



## Contribution of different benefit and tax changes since 2010 to the cumulative impact on net income by April 2022, by gender, ethnicity and employment status – UC recipients

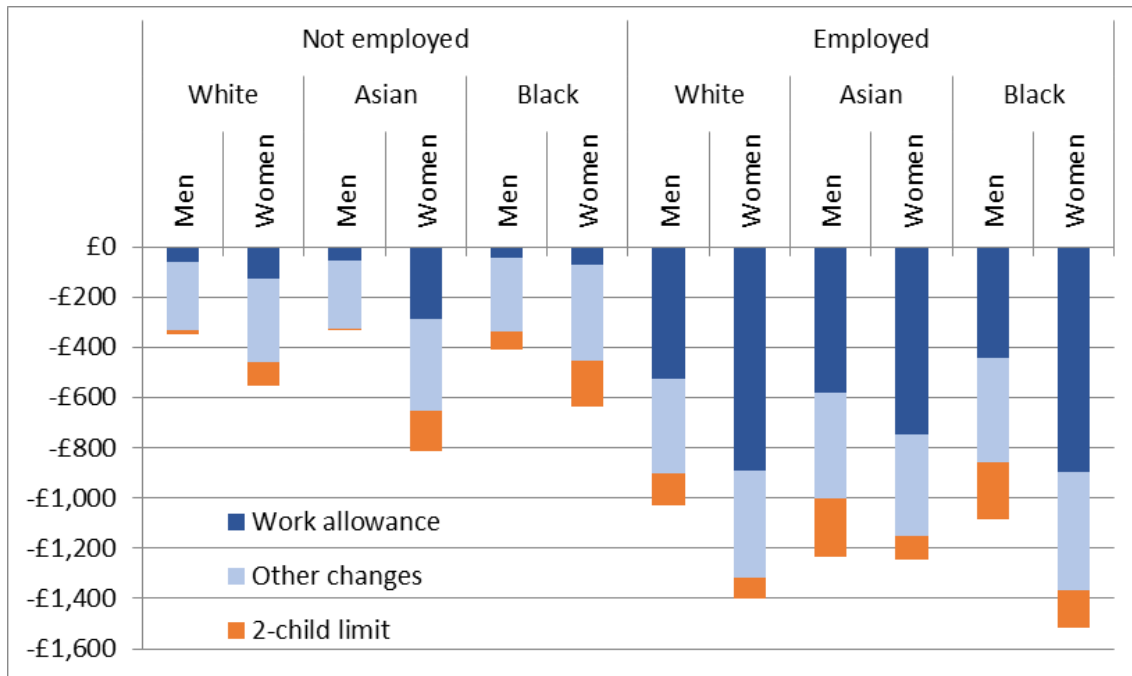


Source: WBG calculations using Landman Economics model – base: all those receiving Universal Credit as entitled using the original 2013 system

- Increase in **NLW** and **PTA** **does not compensate** for cuts to social security
- **Employed women lose over 10 times** as much as they gain (men 6 times)
- Loss of £5000 a year for Black women not in employment (28% of their net income; 32% for their Asian counterparts)
- **Employed black and Asian women lose 20%** of their net individual income



## Individual impact of changes to UC structure since 2013 by gender, ethnicity and employment status (assuming equal split of UC within couples)



- Low earners lose more in cash terms than not employed
- **Women lose more than men** in every group – Black women lose most among employed, Asian women among not employed
- Cut to **work allowance** is responsible for 57% of the changes to UC since 2013 for household with at least one adult in employment
- Large families with someone in employment will lose £3500, half of which from the **2-child limit**, compared to £800 for large families with no one in employment

Source: WBG calculations using Landman Economics model – base: all those receiving Universal Credit as entitled using the original 2013 system

# Whose responsibility for impact assessment?

- Treasury should be undertaking this analysis
  - PSED requires public bodies to take into account **impact on women and other protected groups**
  - EHRC investigation concluded that such analysis would “offer an important way forward” in help ministers “in carrying out their responsibilities under the PSED legislation “
- Women & Equalities Select Committee report on government
  - Described Treasury’s equality impact analysis as **‘insubstantial and lack in detail’**
  - Called for **an independent inquiry**

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@tum2us\_org, @WEP\_UK and 3 more are Tweeting about this
- #ThursdayThoughts**  
@Emmabarnett and @YWTrust are Tweeting about this

Angela O'Hagan and 7 others Retweeted

**(((Dawn Butler MP)))** @DawnButlerBrent · 12 Dec 2017

The Govt refuses to publish cumulative impact assessments of #Budget2017. Please RT our clause to the Finance Bill to ensure govt publishes the regional impact of their budget on different households, gender & others with protected characteristics. #PublishTheImpact

**Committee of the whole House: 11 December 2017** 7

**Finance (No. 2) Bill, continued**

Kate Hollett	Mr George Howarth	Dr Rupa Huq
Diana Johnson	Sarah Jones	Barbara Keeley
Afnal Khan	Ged Killen	Mr David Lammy
Mrs Emma Lewell-Buck	Clive Lewis	Rebecca Long Bailey
Ian C. Lucas	Shabana Mahmood	Seema Malhotra
Sandy Martin	Kerry McCarthy	Amy McDonald
Alison McGovern	Anna McMunn	Alex Norris
Kate Oamaru	Teresa Pearce	Matthew Pennycook
Jess Phillips	Laura Plouck	Jo Platt
Luke Pollard	Lucy Powell	Yasmin Qureshi
Faisal Rashid	Rachel Reeves	Danielle Rowley
Naz Shah	Tulip Siddiq	Ruth Smeeth
Laura Smith	Alex Sobel	Jo Stevens
Wes Streeting	Gareth Thomas	Stephen Twigg
Chuka Umanah	Thelma Walker	Matt Western
Mohammad Yasin		

★ To move the following Clause— NC6

**"Equality impact analyses of provisions of this Act"**

(1) The Chancellor of the Exchequer must review the equality impact of the provisions of this Act in accordance with this section and by a report of that review before the House of Commons within six months of the passing of this Act.

(2) A review under this section must consider—

- (a) the impact of those provisions on households at different levels of income,
- (b) the impact of those provisions on people with protected characteristics (within the meaning of the Equality Act 2010),
- (c) the impact of those provisions on the Treasury's compliance with the public sector equality duty under section 149 of the Equality Act 2010, and
- (d) the impact of those provisions on equality in different parts of the United Kingdom and different regions of England.

(3) A review under this section must give a separate analysis in relation to the following matters—

- (a) income tax (in sections 1 and 3 to 6),
- (b) employment (in sections 7 to 10),
- (c) disguised remuneration (in sections 11 and 12 and Schedules 1 and 2).



**Laurence Bond**



**Coimisiún na hÉireann um Chearta  
an Duine agus Comhionannas**

**Irish Human Rights and Equality Commission**

# Budget Proofing for Equality and Human Rights in Ireland

**Laurence Bond,**

Director

Irish Human Rights and Equality Commission

# About the Commission

- established in primary legislation - Irish Human Rights and Equality Commission Act 2014, commenced 1 November 2014
- Commission of 15 members , appointed by President Michael D. Higgins.
- Staff of 40+ and growing
- Ireland's National Human Rights Institution and National Equality Body.



## Our Statutory functions .....

- to protect and promote human rights and equality,
- to encourage the development of a culture of respect for human rights, equality, and intercultural understanding in the State,
- to promote understanding and awareness of the importance of human rights and equality in the State,
- to encourage good practice in intercultural relations, to promote tolerance and acceptance of diversity in the State and respect for the freedom and dignity of each person, and
- to work towards the elimination of human rights abuses, discrimination and prohibited conduct



# Strategic Statement 2016-2018

## GOAL 3 Promoting understanding of the indivisibility of equality and human rights

By 2019 the Irish Human Rights and Equality Commission will have advanced and built support for a holistic view of human rights with a particular focus on socio-economic rights.

### We will deliver:

- A strategy which will engage with and impact on major human rights and equality issues;
- An active evidence-based research strategy that improves and enhances decision making on issues of human rights and equality;
- Human rights and equality proofing of key legislation and budgetary processes;
- Enhanced support for expanded protection measures for socio-economic rights.

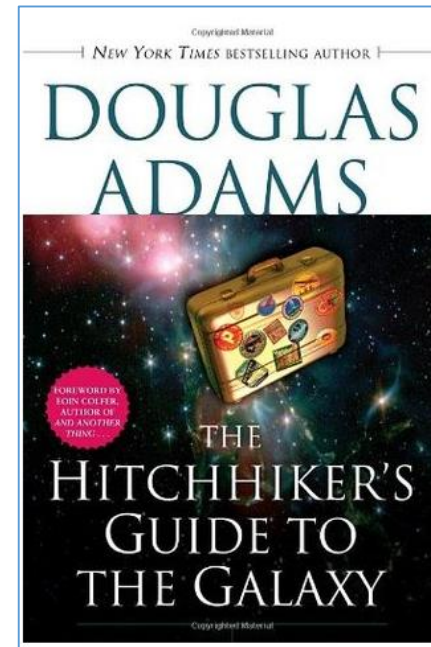
Rectangular Snip





"The answer to the ultimate question of life, the universe and everything is 42."

Douglas Adams *Hitchhikers Guide to the Galaxy*



# The Public Sector Equality and Human Rights Duty



*Number 25 of 2014*

IRISH HUMAN RIGHTS AND EQUALITY COMMISSION ACT 2014

## **Public bodies**

- 42.** (1) A public body shall, in the performance of its functions, have regard to the need to—
- (a) eliminate discrimination,
  - (b) promote equality of opportunity and treatment of its staff and the persons to whom it provides services, and
  - (c) protect the human rights of its members, staff and the persons to whom it provides services.



# Steps to be taken

1. In preparing strategic plans, set out in a manner *accessible to the public* an **assessment** of the human rights and equality issues it believes to be of relevance to its functions
2. **Develop** policies, plans or actions proposed to address those issues
3. **Report** in a manner *accessible to the public* on developments and achievements in that regard in its annual report



# The Commission's role

- Section 42(3): May **give guidance** to and encourage public bodies in developing policies
- Section 42(4): May **issue guidelines** or **prepare codes of practice**
- Where IHREC considers there is failure by a public body to perform its functions in a manner consistent with section 42, it may invite the public body to:
  - carry out a **review** in relation to the performance by that body of its functions
  - prepare and implement an **action plan** in relation to the performance by that body of its functions
  - such a review or action plan may be general or specific to a particular aspect of human rights or discrimination



# Programme for Government May 2016



- *“...we will develop the process of budget and policy proofing as a means of advancing equality, reducing poverty and strengthening economic and social rights.”*
- *“We will ensure the institutional arrangements are in place to support equality and gender proofing in the independent fiscal and budget office and within key government departments and to draw on the expertise of the Irish Human Rights and Equality Commission (IHREC) to support the proofing process.”*



## Linking Budget Proofing and the PSD....

Government Departments, as part of their Section 42 Public Sector Duty, should:

- outline key human rights and equality statements, and
- link budget expenditure to advancing and realising such goals.



# Relationship btw budget frameworks HR & Equality

- Fundamental concept of marrying equality and human rights governance principles policy with economic policy
- Spending plans and economic strategies, and medium-term economic frameworks are vehicles for advancing equality
- Human rights principles can keep the focus on good budget governance including a robust evidence base, and mechanism to guarantee participation, transparency and non-discrimination
- Equality or human rights goals become more embedded when they strategically fit with other government priorities and narratives



# Promoting support and capacity for proofing

- 2014 Research on 'Gender Impact of Tax and Welfare Changes'  
<https://www.ihrec.ie/documents/gender-impact-of-tax-and-benefit-changes/>
- In 2016 expert workshop reviewing experience in a range of proofing initiatives
- Special edition of the journal *Administration* on human rights and equality budget proofing published in August 2017, and free to access at this link <https://www.degruyter.com/view/j/admin.2017.65.issue-3/issue-files/admin.2017.65.issue-3.xml>
- Series of factsheets ( on our website at <https://www.ihrec.ie/our-work/budget-proofing-human-rights-equality/> )
- Engagement with civil society – e.g. funding of the NWCI project on Towards Gender Responsive Budgeting in Ireland ( [http://www.nwci.ie/index.php/learn/publication/toward\\_gender\\_responsive\\_budgeting\\_in\\_ireland](http://www.nwci.ie/index.php/learn/publication/toward_gender_responsive_budgeting_in_ireland) )





# Promoting the implementation of the PfG commitment....

- Engagement with the Oireachtas/Parliament
  - Appeared a number of times before the parliamentary committees
- Commitment to proofing linked to development of greater parliamentary scrutiny
  - Establishment of new Committee on Budgetary Oversight
  - Establishment of new Parliamentary Budget Office
- Engagement with Government Departments
  - From the beginning of 2017 –engagement with Department of **Public Expenditure** and Reform
  - Examining how equality proofing could be integrated with more general expenditure planning and budgeting mechanisms



# October 2017: Budget 2018 Speech...



“ I am pleased to say that work on equality and gender proofing of the Budget continues. The Government is working with partners such as the Irish Human Rights and Equality Commission to achieve the goal set out in the Programme for Government relating to equality and gender proofing of Budget measures. ”

#Budget18



Coimisiún na hÉireann  
um Chearta an Duine  
agus Comhionannas  
Irish Human Rights and  
Equality Commission

— **Pascal Donohoe TD**  
Minister for Finance, Public Expenditure and Reform



“ Concrete steps include cross-departmental workshops with the Commission, examination of international best practice and the development of a policy document which will be published today. This afternoon, I want to reconfirm that the Government will continue to provide leadership in this area. We will work with the Commission and others active in this field to ensure that equality and gender proofing is delivered. ”

#Budget18



Coimisiún na hÉireann  
um Chearta an Duine  
agus Comhionannas  
Irish Human Rights and  
Equality Commission

— **Pascal Donohoe TD**  
Minister for Finance, Public Expenditure and Reform



# Equality Budgeting – Proposed Next Steps in Ireland Paper



<http://www.budget.gov.ie/Budgets/2018/Documents/1.Equality%20Budgeting%20-%20Proposed%20Next%20Steps%20in%20Ireland.pdf>



# Next Steps

- Build on existing analytical tools
  - Social Impact Assessment Framework
  - Distributional Modelling
  - Spending review
- Pilot Approach for Budget 2018 through the Performance Budgeting Framework
  - Focus on a number of expenditure programmes already in existence
  - Relevant Depts assess chosen policies for relevance and impact on gender equality
  - Define high level gender objectives and indicators for the policy in question
  - Report on progress in achieving the objectives in following year Public Service Performance Report



Department	Programme	Allocation €m	Gender	Socio-Economic
Education & Skills	<i>Skills Development</i>	376.5	y	
Transport, Tourism & Sport	<i>Sports &amp; Recreation Services</i>	111.4	y	
Business Enterprise & Innovation	<i>Innovation</i>	356.1	y	
Culture Heritage & Gaeltacht	<i>Culture</i>	167.3	y	
Health	<i>Health &amp; Wellbeing</i>	244		y
Children & Youth Affairs	<i>Sectoral Programmes</i>	567.9	y	y
<b>Total</b>		<b>1,823.2</b>		



- ‘Key High Level Metrics’ and ‘Contact and Impact Indicators’ published in Revised Estimates;
- These have been reviewed and critiqued by the Parliamentary Budget Office ([https://data.oireachtas.ie/ie/oireachtas/parliamentaryBudgetOffice/2018/2018-02-27\\_the-gender-and-equality-budgeting-pilot-in-the-revised-estimates-for-public-services-2018\\_en.pdf](https://data.oireachtas.ie/ie/oireachtas/parliamentaryBudgetOffice/2018/2018-02-27_the-gender-and-equality-budgeting-pilot-in-the-revised-estimates-for-public-services-2018_en.pdf))
- PBO not over impressed - the quality ‘varied’
- No performance reporting yet published
- So where are we???



# Need for an institutional driver...

- “Establish a national proofing committee to advance the institutional framework for human rights and equality proofing, chaired by the Chair of the Budget Oversight Committee and with the IHREC, ESRI , Irish Fiscal Advisory Council, NESC, CSO and independent experts as members”
- Expert Advisory Group on Equality Budgeting



- “The person who removes a mountain begins by carrying away small stones.”





# Thank You!

[www.ihrec.ie](http://www.ihrec.ie)

@\_IHREC



**Coimisiún na hÉireann um Chearta  
an Duine agus Comhionannas**  
Irish Human Rights and Equality Commission

**Prof. Joan Ballantine**

**Prof. Ann Marie Gray**

# Gender Budgeting Context/Background

- Gender Budgeting –aims to analyse any form of public expenditure from a gender perspective
- Has the potential to identify the implications and impacts of expenditure on all genders (Loftus, 2016)
- Potential of gender budgeting has been recognised by a number of countries, e.g. National Women's Council of Ireland argues it can underpin the resource collection and allocations required to deliver the National Strategy for Women and Girls (2017-2010)

# Gender Budgeting Context/Background

- Gender Equality is important to securing a more equal society and sustainable peace (Nduwinmana, 2000)
- Central to gender equality is restructuring spending decisions as “budgetary allocations affect the economic and social opportunities of women and men” (O’Hagan, 2015, p.2)
- Gender budgeting can therefore contribute to the elimination of unequal outcomes and increase opportunities for women’s participation in civil and political life (Quinn, 2009)

# Gender Budgeting: Proposed Research Project

- Proposed research will
  - Establish the extent of knowledge and understanding of the concept and practice of gender budgeting among key stakeholders at a governmental level
  - Explore whether there is any evidence of gender budgeting being implemented within government structures in Northern Ireland
  - Develop a framework for gender budgeting in Northern Ireland

# Proposed Research Project: Stages

Stage 1: Literature Review of Gender Budgeting  
Review of Design, Development & Implementation of Gender Budgeting elsewhere



Stage 2: Empirical Field Work  
Identify Key Stakeholders; In-depth Interviews;  
Review Strategic Policy Documents; Conduct Economic Modelling Exercises



Stage 3: Recommendations to Progress Gender Budgeting in Northern Ireland; Construction of a Gender Budgeting Framework



Stage 4: Dissemination of Findings  
Written Report; Presentation of Findings at workshops/conferences; On-going Engagement and Dialogue; Publication of findings

# Gender Budgeting Key Stakeholders



The Northern Ireland Assembly  
(elected Members of the Legislative  
Assembly (MLAs))



Representatives from the main political  
parties (approx. 6 interviewees)

The Northern Ireland Executive  
(if resumed)



Representatives (approx. 2 interviewees)

The Northern Ireland Civil Service  
(9 Government Departments)



Representatives from key government  
departments with the potential to  
influence gender responsive budgeting  
(e.g. Department of Finance, Department  
for the Economy, Department for  
Communities plus officials leading the  
Programme for Government) (approx. 6  
interviewees)

Local Government, Health & Social Care,  
Further & Higher Education, Non-  
Departmental Public Bodies (NDPBs)



Representatives from public sector public  
bodies with the potential to implement  
gender responsive budgeting policies  
(approx. 11 interviewees)

## Interviewees



# Short Term Outcomes

- Understand the context/factors important, to the development /implementation of gender budgeting and how this might be applied to Northern Ireland, a post-conflict society;
- Raise awareness among key stakeholders in Northern Ireland of the gendered nature of existing budgetary processes;
- Raise the profile of the importance and contribution which gender budgeting can make towards eliminating gender inequalities in Northern Ireland, thereby contributing to a stronger civic post-conflict society that encompasses all communities and promotes reconciliation;
- Provide an analysis of the potential impact of adopting a gender budgeting approach through application of economic modelling in selected policy areas;
- Identify gaps in the statistical data required for gender budgeting to be effectively implemented, including gender disaggregated data;
- Development of a gender responsive budgeting framework for N.I.;
- Increase awareness of the potential for gender budgeting to contribute to reducing gender inequalities in N.I.



# Long Term Outcomes

- Increase transparency and accountability of government in terms of the impact of its spending decisions on women and men;
- Bring about impact in terms of changes to government policy and resource allocation procedures and policies which positively impact on women, thereby building a stronger and sustainable civic post-conflict society that encompasses all communities and promotes reconciliation;
- Bring about impact through transformation in public spending through gender responsive budgeting and, in doing so, tackle one of the key barriers to gender equality;
- Contribute to endeavours in other post-conflict societies to promote the full participation of women through gender responsive budgeting.

Sustainable Gender Equality - a film about  
gender mainstreaming in practice

<https://vimeo.com/77692813>

# Thank you for your attention



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[am.gray@ulster.ac.uk](mailto:am.gray@ulster.ac.uk)



**Dr Evelyn Collins**

# Panel Questions

# Bronagh Hinds Reflection

# Dr Elaine O'Neill

## Reflection

# Suzanne Wylie

## Reflection



# Owen Reidy

## Reflection

# Closing Address

## Cllr Deirdre Hargey