

A critical review on Gender Budgeting in Italy

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Abstract

The main goal of the paper is to analyze the contemporary situation of gender budgeting in Italy, launching a comparative analysis of some implemented initiatives. In Italy, the gender budget exercises have gradually encompassed the administration involved, providing more detailed information on the status of women. Clearly, however, they do also reveal the difficulty administrations have in grasping and incorporating concerns over gender equality. The paper offers some insights on the current development of the “velvet triangle” in Italy, stressing some critical points on the implementation and the future of the gender budgeting initiatives.

The gender budgeting initiative in Italy was originated by a seminar organised by the Ministry for Equal Opportunities in 2000, to which local administrators from all Italy attended. The Ministry proposed a plan to implement Gender budget analysis at the central government level, but the newly elected government in 2000 did not follow through with this initiative. However, at the regional level this idea took hold and by 2002 there were already 4 regional initiatives started and up to today many municipalities and Provinces implemented gender budget exercises, for a population accounting for 9.6 million inhabitants.

Main characteristics of the different initiatives in Italy are difficult to summarize, because the regional, provincial and municipal level governments are responsible for different policies; a full classification of methods and research tools is very difficult because each analysis is meant to suit a particular local context. In general however, the first step leads to the identification of a series of indicators. These indicators are used to carry out a gender audit of the budget cycle. The project then involves negotiation with the political level and then introducing GB into the yearly social balance sheet (administrative level); the final goal is to make appropriate changes in the next yearly budget. The awareness raising activities targets government at different levels, but also women’s associations, trade unions and citizens at large.

1. Experiences of Italian local government implementing gender budget projects. Main features

1. Engaging of an “inside institutions” approach. It is possible to conduct the analysis without the participation of the local institutions and bureaucracy, however, if the objectives are to change the financial policy, this can hardly be done without the cooperation of the people in the position of power.
2. Results of the analyses are presented in a separate document with a title, e.g. gender budget.
3. Most of the time is the result of a “think-thank” of experts (mainly academic), but there are also examples of a direct involvement of the local bureaucracy (Regione Marche);
4. Analyses present situation and expenditure with reference to women and men; only Regione Emilia Romagna analysis presents an analysis of the revenue side of the budget.

2. Experiences in Italy. Innovative elements

2.1 EMILIA ROMAGNA Region and Province of MODENA

Budget cycle 2000/2001; Financing institutions: Emilia Romagna Region; The researchers proposed a methodology based on the use of indicators that stressed which specific issues needed to be looked at in budget, depending on whether their value was above or below Italian or EU averages (benchmarking methodology). A number of analyses on the influence of financial policy on the situation of women has been conducted. Reports suggest to modify taxation. One example is the change of taxation of households with two working parents. Before it made not much economical sense for the spouse who earned less to go out and work. Because of the income gap, it was usually the woman who gave up her job or took up partial job. Recommendations include different criteria for allocating and increasing public child care places, as to increase women’s chances to either find work or attend training, or to adapt transport policy to the different needs and uses by women and men

2.2 Province of GENOVA and Municipality of SESTRI LEVANTE

Budget cycle: 2001; Financing institution: Province of Genova;

At the moment, it is the most used methodology of gender budgeting in Italy, based on the disaggregation and re-aggregation of expenditures in 4 areas:

1. Women-specific targeted expenditures, eg. resources allocated for programs that specifically target women; Equal employment opportunity expenditures, eg. resources allocated to affirmative action in order to promote employment of women and men in equal numbers, equal representation within management posts, and equal pay.

2. Gender – targeted expenditures (child and elderly care; social policy; labor market; training...)
3. Environmental expenditures (transports, culture, environment, sport...)
4. Mainstream expenditures: the bulk of the remaining expenditures not covered by the first two categories (mostly administrative costs)

2.3 *MARCHE Region*

Budget cycle: 2003-2004;

The most innovative element of this experience is the direct involvement of bureaucracy in the process. Each department was invited to specify its gender equality guidelines and to present the equality indicators they considered most relevant to their particular area of responsibility. The training and awareness raising of the people working on the project points to the possibility of continuing the work. The analysis has been summarized in an information kit on gender budgeting covering such issues as content and methodology; the result is that project participants now have enough professional skills and gender sensitivity to further develop and apply the methodology of gender analyses to budgets in the regional context and to spread the experience at provincial level.

2.4 *Province of CATANZARO*

Budget cycle: 2005-2006;

Catanzaro initiative was started in 2007. Worth noting, the province of Catanzaro is the first administration in the South of Italy which experimented GBA.

Strategies and actions

Given the fact other GBA experiences are concentrated in the Northern part of Italy, this first part of the analysis has been conducted with a special focus on the context. The analysis involves the following steps: A. Involvement of stakeholder (politicians, administrators and employees) through specific interviews on general and gender policy goals; identification of the main areas of intervention of the Province (expenditures and revenues); B. Analysis of 2005 Final Budget and Preliminary draft, including an overall forecast of revenue and expenditure for a given year (2006), plus different planning documents and surveys. Then the project presents a disaggregation of the budget and a reclassification in 4 areas (1. directly related to gender/equal opportunities; 2. indirectly related to gender – education, professional training, employment, social services - , 3. “environmental area” – culture, sport, economic activities, transports, viability - , 4. “neutral” area (administration costs. The exercises proved helpful in identifying lack of proper sex disaggregated data as well as suggesting recommendations.

In all cases the recommendations did not advocate for more funds, but rather to a more equitable access to resources, and further research into the gender differentiated impact of the programs. For example, the initial analysis of indicators showed that the demand for services related to work-family reconciliation were particularly important. Therefore labour market policies, policies for services for different groups of the populations (children, adolescents, socially excluded, and older people) environmental policies (including transport policies) are identified as area to be analysed under a gender lens.

3. Good practices and critical points

- Engaging authorities and political good will - no project can be successfully done without cooperation of the authorities if this project requires reforming public finances. It may happen that authorities are not interested in hearing such analyses. If this situation occurs next rule must be employed.
- Promoting gender equality – it is important especially when authorities are not interested in implementing of gender budget recommendations. It becomes necessary to stress benefits from implementing equality.
- Conferences and trainings are helpful. NGOs and academics should be of assistance as the experience of other countries proves.
- Transparency and cooperation – are crucial for success. Experts from multiple areas should be engaged, like finances, sociology, economy and politics. There should be both women and men involved in planning. Consulting is also recommended as well as reaching out to local associations and groups to gain their support
- Long-term strategy

4. Conclusions

In Italy, the gender budget exercises have gradually encompassed the administration involved, providing more detailed information on the status of women and efforts to achieve gender equality. Clearly, however, they do also reveal the difficulty our administration has in grasping and incorporating concerns over gender equality. The future development of the GBA in Italy will show how and to what extent each administration has taken on board this process.

In 2006 two proposals have been issued at the Senate (by Sen. Dato and Sen. Boato). But government changed in 2008.

The proposals aimed at implementing gender budgeting into the regular tasks of public administration. The proposals take into consideration that one major obstacle to the development of analytical policy tools,

assessment of impacts and monitoring of policies is lack of appropriate gender disaggregate data. The main problems relate to increasing awareness about gender and budgets, targeting the impact of the initiatives on concrete results, and guaranteeing the sustainability of initiatives.

Basically four challenges are clear in most of the experiences reviewed:

- Weak understanding of gender issues in general (and thus the need to continue awareness raising).
- Weak participation of civil society in the process. Forging alliances and coalitions within civil society that increase the potential of women to participate in budgetary debates and decision-making is crucial.
- Inadequate or insufficient participation by all stakeholders (the fiscal authorities in particular), which, in turn, is a crucial element of the fourth challenge.
- Sustainability of the initiative/ Developing instruments, methods and procedures to implement gender budgeting as a standard task of governments and public administrations.

Increasing involvement of governments in gender budgeting means a risk that the governments take over the concept in their public discourse without changing policies substantively. Analysis is an essential part but more attention needs to be directed towards changing policies in order to improve gender relations.

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