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PAPER

SESSION TWO

Interlinking Gender Responsiveness and Participation in Public Budgeting Processes: Limits Opportunities

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Abstract:

Firstly, I will deal with the interrelations of Participation and Gender Equality: Participative budgeting is not automatically gender just – and gender responsive budgeting is not automatically participatory. I will do so, by focusing on examples from Germany (mainly on the city of Freiburg and Berlin) also showing ways, possibilities and limits to interlink participation and gender equality. By using these examples, I will also give a typology of levels of participation in Gender Responsive Budgeting processes, considering different forms of knowledge which comes into play in GRB.

This raises the question: How can the tension between expert knowledge (in regard to GRB this is a) knowledge on budget management and b) "gender knowledge") and the knowledge of citizens (often referred to as beneficiaries) be dealt with in gender responsive Participatory Budgeting? In which way social power relations can be channelled in these processes? Assuming, the main objectives of GRB are a) more transparency, b) empowerment of disempowered social groups and c) more effective budgeting: What are the limits and opportunities of social change in GRB processes in the light of the German experience?

1. Introduction

Participative budgeting is not automatically gender just – as gender responsive budgeting is not automatically participatory: At the one hand participatory approaches and methodologies have been criticized for being "gender naïve" (Guijt & Shah, 1998, p. 2). At the other hand Gender Budgeting could be criticised to imply a technical (if not technocratic) approach which is driven by expert's knowledge, not taking into account the needs and interest of the most marginalised groups. I will argue in this paper that both critiques have good reasons – but also shortcomings.

This paper will examine the interlinks between the participation and gender discourse, asking for similarities, differences and tensions. What can actors involved in participatory processes learn from a gender discourse – and what can actors working to achieve gender equality learn from discourses on participation?

My background and perspective is a "gender expert". In Germany, I support the Federal and sub federal administration bodies to implement strategies like Gender Mainstreaming and Gender Budgeting; therefore the perspective taken here is informed much more by a gender discourse than by a participation discourse. Examples from Germany also will be used to examine the topic (being aware that the insights gained from these examples cannot be simply transferred to an Asian context) Two German examples will be especcielly addressed because in these cases Gender Budgeting and Participatory Budgeting have been implemented both: Berlin, as one of 16 Federal States in Germany, was the first government to start a Gender Budgeting process. It was implemented on the level of the Berlin Ministries

("Senatsverwaltungen") as well as on community level (in the 12 Berlin Boroughs). It had elements of participation from the beginning on. The borough of Lichtenberg is of special interest, when it comes to Gender Budgeting and Participatory Budgeting: it was one of the first administration bodies piloting on Gender Budgeting in the beginning of the 2000ies. At the same time Lichtenberg was one of the pilot communities for Participatory Budgeting. Another interesting example for looking closer at the intersection of gender and Participatory Budgeting is the City of Freiburg. Participatory Budgeting as well as Gender Budgeting were implemented in the late 2000ies in this Southern City of Germany. An evaluation of the Participatory Budgeting process from a gender perspective gives especially interesting insights into the subject (Färber, without year). On federal level, Gender Budgeting has not been implemented in Germany.

2. Participatory Budgeting through a gender lens

In their book: "The Myth of Community. Gender issues in Participatory Development" (1998) Guijt and Shah state: "Despite the stated intention of social inclusion, it has become clear that many participatory development initiatives do not deal well with the complexity of community differences including age, economic, religious, caste, ethnic and, in particular, gender." (Guijt & Shah, 1998, p. 1). This critical intervention, made in the light of the experiences of Participatory Learning and Action (PLA) in the end of the 1990ies and in the context of development workⁱ, in my view can also be useful to current processes of Participatory Budgeting over the world. Although there are many different processes of participatory and citizens budgeting, there are enough examples of gender blindness or of including gender issues just superficially - for example when "taking a gender perspective" is limited to efforts to ensure equal access for women and men - or by assessing the numbers of women and of men involved in participatory processes. If however, participation should be more than just involvement, meaning the aim of introducing a "peoples' budget" is about empowerment, then it is important to note: Participation as such does not ensure a transformation of power relations of different social groups. On the contrary there may be adverse effects, as this quote indicates: "Participatory spaces can merely reinforce old

hierarchies based on gender, caste or race. They can also contribute to greater competition and conflict across groups who compete for the recognition and resources in new ways."

(Development Research Centre on Citizenship, Participation and Accountability, 2011, p. 7). This statement from a context of development cooperation can be also transferred to projects in Europe: Massner for the German context states that it is "middle-aged, well-educated men" who participate in Participatory Budgeting:

"One general point of criticism directed at all processes of citizen participation is that these processes provide individuals and influential interest groups who are in any case particularly politically active, with additional opportunities to get involved and influence things. At the level of individuals, this primarily means men from better-educated, higher-earning strata, who not infrequently dominate the participant groups. At the level of groups, this means well-organised interest groups and 'grassroots elites' that are usually both financially strong, and have human resources or time at their disposal. The criticism that additional participatory offerings enable these segments of society to gain disproportionate and basically undemocratic influence (...) also applies to numerous PB processes."(Massner 2013).

If a stabilisation of unequal power relations wants to be avoided, the critique of "gendernaivety" (if not gender-blindness) should be taken serious. This means...

- a) ...different social groups of women and men should have the same opportunities to have political influence in Participatory Budgeting and
- b) ...gender should be included as a structural category in the processes of Participatory Budgeting.

In the following section, will focus on these three dimensions of gender in Participatory Budgeting.

Studies on Participatory Budgeting processes in in Germany show that there often is an overrepresentation of males in the age between 25 to 45. Massner gives figures on the

a) Opportunities to have influence within Participatory Budgeting

proportion of women and men involved in Participatory Budgeting: According to him, in the German city of Trier just 37 percent of the participants were women. For online participation there are figures showing low representation of women (Massner 2013). According to Stiefel in an online survey in the city of Hamburg in May 2006 only 15 percent of the votes came from women. The votes were on ways to cut public expenditure and consequently the proposals represented what can be called "male preferences". Proposals for cut downs came in the areas of social welfare, family support and culture (Stiefel 2010).

An evaluation from a gender perspective of the participatory budget in the city of Freiburg also showed that women were often underrepresented (Färber, without year). An exception in terms of representation of women and men in Participatory Budgeting is one of the first and most prominent examples for Gender Budgeting in Germany: The borough of Berlin-Lichtenberg (part of the City State of Berlin) was one of the pilot boroughs within Berlin for creating procedures and methods for Gender Budgeting in the 2000ies. It introduced Participatory Budgeting some years later. When evaluating the participation of men and women in 2010, it showed that women were involved in all forms of participation via (online, events as well as quarter conferences) to a slightly bigger extend (54.6 percent).ⁱⁱ Looking at possible inequalities in the involvement of women in Participatory Budgeting however, is only one dimension of "gender". Looking closer into Participatory Budgeting, it is interesting to examine whether different social groups of men and women will articulate different or similar needs and interests in a such a process. Figures from Germany give a mixed picture: For the example of Freiburg, Färber shows that there were many different priorities for women, men and single parents (the fast majority of them being single mothers) (Färber 2009, p. 44). Analysing figures from Lichtenberg, Middendorf comes to the conclusion that setting different priorities of citizens depends more on the area of living than on gender.

Ensuring equal access also is about choosing different means of participation. For example, online surveys today are a very common way in peoples budgeting to assess priorities and ask for people opinion. However, access to and usage of the internet depends on various social categories like social status, age and sex. Figures from Germany show, that especially older persons and within this groups women are "noneliners" – meaning they hardly or never use the internet.ⁱⁱⁱ This shows that if online surveys are a core or the only instrument within Participatory Budgeting, this will exclude especially (elderly) women.

To differentiate between "involving women" or ensuring equal representation of women and men at the one hand and a representation in impact and control at the other hand is important. Even if different social groups are involved in political processes, there is not guarantee that this will have an impact on the existence of "grassroot-elites". Therefore it is important to also actively address gender issues in participatory processes.

b) Gender as an explicit topic within Participatory Budgeting

A second component to make Participatory Budgeting gender aware (in opposite to gendernaïve), is to explicitly address gender issues within the process and to provide funds to ensure gender equality.

In German, gender equality is a legal norm: Article 2 of the German constitution says gender equality and equal opportunities have to be *actively* provided by the state. The government has to take care of gender equality as a basic democratic standard. This standard does not only mean resources should be distributed in a gender-just way (for example public expenditures should be distributed to male and female pupils in a way that ensures the same opportunities for girls and boys to get a degree). In addition, it also means public funds should be provided to implement affirmative action and gender equality programmes and projects. In Germany, there are rarely any examples of Participatory Budgeting processes which address gender issues in systematic way. One exception is the Freiburg Participatory Budgeting process. A consultant was contracted to follow-up on the process. In the evaluation report she gives recommendations how to include a gender perspective in the process of Participatory Budgeting within the course of a 13 months cycle: This starts with anchoring gender aspects in the planning phase, giving training for key actors of the administration, gender-sensitive material for informing the citizens as well as systematically producing data aggregated to sex and other categories (Färber, without year, p. 138). For the Freiburg examples the foundation for the State Government of the Federal State of Baden-Württemberg spent about EUR 150.000,- (Färber, without year, p. 135).

To summarise, we can state that participation processes aiming at empowerment will always consider gender aspects in a systematic way. This will go beyond equal representation of female and male citizens in Participatory Budgeting. The actors involved in Participatory Budgeting therefore should know about gender aspects and continuously reflect the impacts on gender relations of the process.

This already shows the limits of a gender-sensitive participatory approach: it is more demanding and complex, requires a certain expertise and it is more costly. Taking into account, that there is the risk of a gender-blind or "gender-naïve" process, which could even reinforce misbalanced gender relations, it should be however worth it.

3. Gender Budgeting through a participation lens

When looking into the intersection of Participatory Budgeting and Gender Budgeting from a different angle, we can ask the question: To what extend have ideas and approaches inspired Gender Budgeting? When studying documents on Gender Budgeting, it often seems that they

do not refer to participation but they focus more on technical procedures and expert knowledge on budget. For understanding why participation is not a major topic in many Gender Budgeting initiatives, it is important to look at the history and the origins of this strategy.

Excursus: Gender budgeting and macro-economics

First of all the origins of Gender Budgeting go back to the 1980ies and 1990ies when a Structural Adjustment Policy (SAP) by the IMF and the World Bank forced the indebted States of the global South to implement programmes which in some countries had disastrous social effects. Deregulation, Privatisation, Devaluation of the local currency, a decrease of the state budget deficit and more measures led to the further pauperisation of the already poor. Some studies showed that some social groups were disproportionally hit by these policies, especially poor women and female headed households even became poorer. Women also had to take over work provided by the State before SAP was implemented. When there were cuts in healthcare tasks provided by the State were shifted in the private households, leading to extend reproductive and care work (see Elson 1989; Gladwin 1991). Gender Budgeting was originally introduced to show the interrelations between these State policies and private households. It was feminist economics who questioned the gender neutrality of macroeconomic politics (see Elson 1991). They proved a "male bias" of dominating economic models and they developed approaches and tools to show the links between the "private sphere" and budget decisions taken by a government.

This means Gender Budgeting in its beginnings was a strategy that applied to national budgets, focused on macro-economic figures and came from scholars in economics. However, in the 1990ies there were also projects on economic literacy for women to make them understand the dynamics of the economy, globalisation and also to better understand a national budget – which can be seen as a participatory intervention (see for example: Women in Development Europe, 2009).

A key publication for the Gender Budgeting discourse was published by Budlender, Sharp and Allan (1998). The authors show seven tools for gender budget analysis. These tools are mainly research techniques; they are about collecting data and creating documents as well as activities to lobby for gender equality. It addresses gender equality advocates and civil society groups working on women's rights. It also demands a certain kind of expert-knowledge on government regulations and procedures.

Elements of participatory approaches can be found in these documents, for example in certain tools proposed by the authors: One of these tools is a "Gender-disaggregated beneficiary assessments" which is describes as follows:

"a tool which allows the voice of the citizen to be heard. Potential and actual beneficiaries of a government programme are asked, using a variety of techniques, their views as to whether existing forms of public service delivery meet their needs as they perceive them. These responses are analysed in order to assess the extent to which a government's current budget meets the priorities of women and men. In essence, women and men participants in beneficiary studies are being 'asked how, if they were the Finance Minister, they would slice the national budgetary pie''' (Budlender and others 1998, p. 41)^{iv}.

This is clearly opening the door for participation but still the application of methods is still mediated and facilitated by experts. One of the reasons for this lack of direct participation: Gender Budgeting comes from a "macro-perspective" focussing on the national budget – whereas Participatory Budgeting has its origins from a grassroots perspective and has been applied within communal contexts. This clearly shows that Gender Budgeting is not participatory as such. There are, however, some entry points for participatory methods within Gender Budgeting which will be looked at more closely in the next section.

3.1 Levels of participation within Gender Budgeting

What does participation in the context of Gender Budgeting mean and which forms of participation are present when implementing Gender Budgeting? In a wide definition of participation, one can state that participations starts if actors outside the government are (in a more direct or indirect way) involved in political decision making processes. When working with this broad definition, three groups of actors in Gender Budgeting processes can be identified, which contribute different forms of knowledge:

- Gender-consultants: In a Gender Budgeting process, these actors will contribute with "gender-expertise", meaning they create or show data and inform about gender aspects in different fields of intervention. This helps to make decision making more evidencebased. Contracted by the government, these experts are not independent, but as scientist they provide an outside perspective.
- Lobby groups/gender equality advocates. These are interest groups also providing knowledge on the situation of social groups. Often they are a corrective to governments because they insist on democratic standards and transparency. They also represent parts of the electorate, which gives them political power.
- 3. Citizens: They are rarely involved directly, if Gender Budgeting is understood as a way of managing the budget. Within the implementation of Gender Budgeting, there are examples of participatory data collection, if administration staff has to deliver gender disaggregated data for a beneficiary's analysis.

When describing the entry points of participation in the next section, I will also elaborate on the question which role these three groups^v in the German context play.

3.2 Entry points for participation

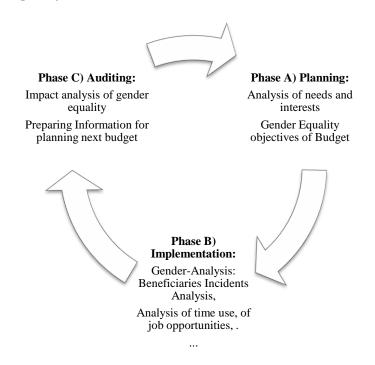
Gender Budgeting is closely linked to Gender Mainstreaming. In Europe, the dominant definition of Gender Budgeting stems from an Experts group of the Council of Europe. According to this paper GB is "an application of gender mainstreaming in the budgetary process." (Council of Europe 2005).^{vi} This means, Gender Budgeting is a management process which integrates gender issues into the "mainstream" procedures and regulations of an administration. It is not an additional project and it is also not limited to just one sector of the budget.

I will now highlight on the budget cycle, which is the management cycle for budget planning, implementation and auditing, giving examples of tools that can or should be used in the course of this cycle in a participatory way.

The budget cycle (see figure below) consists of three phases:

- Planning the budget: This encompasses the budget formulation and the adoption of the budget by a government. The result of this phase is the legally binding budget.^{vii}
- Implementing the Budget: In this phase the public administration spends money on employment of staff, different programmes and projects, contracts private companies or hires individuals and so on.
- 3. Auditing the Budget: In this phase monitoring and evaluation takes place: was public money spent according to the budget law and according to objectives which were decided upon?

Figure: The Budget Cycle



NGOs/civil society groups (gender equality advocates) can be involved in a steering group committee which monitors the Gender Budgeting process in all phases of this cycle. For the Berlin administration there was a Gender Commission established in the beginning of the process. The members were high level administration staff from various units and both levels of the Berlin administration (Senate and Borough). From the beginning on, this commission was seeking advice from gender experts.^{viii} The commission also installed a working group on Gender Budgeting. In this working group one member of the NGO (lobby group) "Initiative for a gender just budgeting in the City of Berlin" was represented. This working group was a core driver for developing the Berlin Gender Budgeting approach; the members were adapting tools for the Berlin context and produced information material also showing approaches and results to a wider public.

For each phase I will now give one example on ways to make Gender Budgeting more participatory, also showing limits to do so. I will do so by using an example in the area of public promotion of sports.^{ix}

Phase A): Planning

When preparing the budget a government should base its plans on evidence about the requirements, needs and interests of citizens of all genders, age groups, social status, ethnic group and other categories of social stratification. As introduced above, one of the instruments in Gender Budgeting is the Gender-disaggregated beneficiary assessments which can have participatory elements (Budlender and others 1998, p. 41).

Sometimes Participatory Budgeting and Gender Budgeting processes may run at the same time: The citizens are asked via participatory methods (district assemblies, online, household-surveys or other instruments) about their priorities. As outlined above, this should be done in a gender-sensitive way. The result of this will be a ranking of priorities a government should set. The results, however, cannot go into detail on how this part of the budget should be spent. If for example a result of a Participatory Budgeting process would be "more subsidies for the promotion of sports", still the government will be responsible for distributing the funds for the promotion of sports in a way that there is also a *just* distribution of these public funds. At this point gender equality objectives will come into play.

Berlin's Gender Equality Framework

The Berlin State government has published a gender equality framework for the year 2008 to 2011, the so called "GPR".^x This document gives objectives for the gender equality policy for the Federal State level as well as the communal level. When creating the GPR, the administration in the year 2007 organised thematic focus groups as well as a conference

inviting gender equality experts, NGOs and women's projects. The result was a definition of gender equality objectives in a wide range of thematic fields. It complements the existing gender equality law and it was also used for a re-orientation of the ongoing Gender Mainstreaming and Gender Budgeting implementation by the Berlin government with the help of gender equality master plans. The administration on each level has to report on a regular basis in which way they contribute to the objectives set in the GPR. There is also a guideline on Gender Budgeting for the Berlin administration which refers to the GPR and the master plan. When setting precise objectives in a certain area of intervention, administration staff has to select objectives for expenditures which should be in accordance with the GPR objectives. They should also indicate in which way a certain title or expenditure will contribute to fulfil the objectives set by the GPR.

When we come back to the example of the promotion of sports: The GPR defines promotion of sports especially for elderly women and for single mothers as gender equality objectives as figures from surveys show that these groups are especially underrepresented in sports services that are subsidised by the government.

This is an example how participatory elements can be included in the implementation of Gender Budgeting in the planning stage when it comes to setting gender equality objectives. It also shows that Participatory Budgeting and Gender Budgeting can be seen as complementary processes.

Phase B) Implementation

In the phase of implementation public money is spent which will always gender effects. Gender analysis methods ask about these effects: Who benefits? Who will have employment opportunities? Who will have to work without being paid for it? These are the questions for analysis that are tackled in a Gender Budgeting process at this stage. One important (but not the only) instrument of Gender Budgeting in this phase is the *Gender-disaggregated public expenditure incidence analysis.* "Thistool can be used to provide an assessment of the distribution of government expenditure of a given programme between men and women and boys and girls" (Budlender and others 1998, p. 44f.). The questions asked and the instruments to be selected strongly depends on the output area in a budget and the thematic areas they tackle.

Coming back to the sports example: In Berlin the 12 boroughs on a regular basis assess the product of "allocation of sports grounds", doing a gender-disaggregated expenditure incidence analysis. In former years the result of the assessment done in the Borough of Lichtenberg showed that more than 60 percent of this product inured to the benefit of male citizens. A similar picture showed in other boroughs in Berlin.

A survey conducted by the Senate of Internal Affairs and Sports in 2008 showed that there is not a big difference in the quantity of sports activities of men and women: men at average are more active, but the gender gap all in all is less than 4 percent (Senatsverwaltung für Inneres und Sport 2008, p. 12).^{xi} However, women and men do different *types* of sports. The Sports subsidised by public funding to a greater extend (for example football) were also the ones, which males preferred. This may not be a surprise, but the figures show that there is an imbalance between the needs of women and men at the one hand and the subsidies made by the government to meet these needs at the other hand.

Phase C) Auditing

In this phase an impact analysis is done. Technically this is a comparison of the objectives (set in phase A) with the output or outcome by implementing the budget (phase B). When this expost evaluation shows a deviation from the objectives set, a government will have to think about how the goals can be met within the course of the next budget cycle (or maybe whether objectives should be adjusted).

Coming back to the example of sports and having stated that there is an imbalance between the objectives set by the GPR (involving more women in sports, especially certain groups of women) as well as the needs of women and men doing sports (less than 4 percent difference) and at the one hand – and the subsidies made by the government to meet these needs (in at least one borough almost 20 percent difference in the provision of sports grounds in favour for males) at the other hand. This indicates that the government will have a responsibility to reallocate funds.

The results of this analysis can be used by gender equality advocates as well as in the context of other participatory approaches to "scandalise" the gap between objectives and real outcome. With these facts on the table, civil society groups are even more able to make a government accountable for a gender just allocation of the budget.

4. Conclusion

For Germany, one can state that Gender Budgeting and Participatory Budgeting are (still) separately implemented and only in some cases there are clear connections to both approaches. Interlinking these processes has opportunities: mainstreaming a gender perspective into Participatory Budgeting has the potential to give more precise results by actively including all social groups of citizens to give their perspectives. Taking a gender perspective also means to raise questions of inclusion and exclusion in decision making processes. This is not only about whether women and men of various social groups are represented in Participatory Budgeting. It also enables an administration to better reflect its procedures and standards.

There are however limits when combining Participatory Budgeting with gender issues. To deal with the complexity of social stratification is difficult. Gender is not just about "women" (also not about women and men) - it is about women and men in various life situations, according to age, social status, ethnic groups and many other categories. Facilitating this diversity in a way that power relations will be more balanced can make participatory approaches very demanding – and costly.

Gender Budgeting actors can also learn from participatory processes: originally not designed as a participatory strategy as such, there are elements of participatory methods in it. Participatory approaches can anchor Gender Budgeting when it comes to the question of what concretely gender equality will mean for women and men. Setting objectives from an ebony tower of an administration or speculating about the needs and interests of women and men is not a sustainable way to govern.

In my view there are also limits when trying to make Gender Budgeting more participatory:

- a) In Germany, gender equality is stipulated by law. In case Participatory Budgeting would result in an unjust distribution of funds, this could conflict with democratic standards provided by the law.
- b) The public budget is a complex matter, especially on a national or Federal State level. There are good examples for combined gender and participatory approaches on budgeting on the communal level. When it comes to the effects of macro-economics on gender relation there is the need of specialised knowledge for assessing the impact of certain budget policies. Forms of direct participation will at this point have their limits.

From the German experiences I come to the conclusion that Gender and Participatory Budgeting should complement each other – but there are limits to be aware of. There is however a clear communality of Gender and participatory Budgeting: In the end of the day (democratically) elected bodies will be accountable for allocating the public budget in a transparent and gender just way. A government should therefore make use of the various opportunities Gender Budgeting and Participatory Budgeting offer for good governance.

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ⁱ See also Cornwall (2000)

ⁱⁱ Source: <u>http://gleichstellung-weiter-</u>

denken.de/pdf/17_forum2_johannes_middendorf_gb_im_buergerhaushalt.pdf

ⁱⁱⁱ A study in 2007 showed that within the group of persons over the age of 50 there are 27,8 percent of women compared to 44,3 percent of men (Kompetenzzentrum 2007). In 2013 the overall gender gap in using the internet in Germany still is almost 10 percent (source: <u>http://www.nonliner-atlas.de/</u>)

^{iv}The source given for the quote is: Diane Elson, 1997b, p. 13.

^v There is sometimes a conflation of roles: Not only because each consultant and lobbyist/advocate at the same time is a citizen; we also may find that gender equality advocates have built knowledge over time and became experts on gender issues.

^{vi} Gender Mainstreaming has its origins in the "Gender and Development" (GAD) discourse. Within GAD various gender-analysis frameworks have been created which again offer a variety of methods and tools (March et. al 1999). Many of these tools are applied in a participatory way.

^{vii} Sharp (2003) differentiates this phase in two stages (preparation and enhancement) and therefore identifies four phases within the budget cycle.

^{viii}<u>http://www.parlament-berlin.de/ados/WiBetrTech/vorgang/wbt15-0251-v%20Anlage%202.htm</u> ^{ix}The example is hypothetical in a way that it does not exist throughout the whole budget cycle. The figures given in this example however are based on evidence.

^x<u>http://www.berlin.de/imperia/md/content/sen-frauen/gpr.pdf?start&ts=1208268947&file=gpr.pdf</u> ^{xi}<u>http://www.berlin.de/imperia/md/content/sen-</u>

sport/sportpolitik/umfergweb.pdf?start&ts=1216287390&file=umfergweb.pdf