

Kira S. Goryacheva¹IMPLEMENTATION OF GENDER BUDGETING IN THE FORMER
YUGOSLAV REPUBLIC OF MACEDONIA

The article presents the experience of gender budgeting implementation in the former Yugoslav Republic (FYR) of Macedonia as the main instrument for gender mainstreaming and application of gender equality principles in the budget process.

Keywords: gender budgeting; gender equality; gender mainstreaming.

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ВПРОВАДЖЕННЯ ГЕНДЕРНОГО БЮДЖЕТУВАННЯ
У КОЛИШНІЙ ЮГОСЛАВСЬКІЙ РЕСПУБЛІЦІ МАКЕДОНІЯ

У статті представлено досвід впровадження гендерного бюджетування у колишній Югославській Республіці Македонія як основного інструменту реалізації комплексного підходу до гендерної рівності у бюджетному процесі.

Ключові слова: гендерне бюджетування; гендерна рівність; комплексний підхід до гендерної рівності.

Табл. 1. Літ. 11.

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ВНЕДРЕНИЕ ГЕНДЕРНОГО БЮДЖЕТИРОВАНИЯ В БЫВШЕЙ
ЮГОСЛАВСКОЙ РЕСПУБЛИКЕ МАКЕДОНИЯ

В статье описан опыт внедрения гендерного бюджетирования в бывшей Югославской Республике Македония как основного инструмента реализации комплексного подхода к гендерному равенству в бюджетном процессе.

Ключевые слова: гендерное бюджетирование; гендерное равенство; комплексный подход к гендерному равенству.

Introduction. Gender budgeting owes its phenomenal growth in the past decade to the recognition that it is an effective tool for advancing gender mainstreaming, currently the main international approach to promoting equality between women and men. By considering the impact of every part of the budget on women and men, girls and boys, a gender-responsive budget actively addresses gender gaps in budget allocations, particularly in key areas such as income, health, education, and development, and ensures that government resources are allocated where they are most needed for the benefit of all.

The most recognised definition of gender budgeting is formulated by the Council of Europe, that determines it as an application of gender mainstreaming in the budgetary process. It means a gender-based assessment of budgets, incorporating a gender perspective at all levels of budgetary process and restructuring revenues and expenditures in order to promote gender equality (Council of Europe, 2005).

Hence, gender budgeting is not about creating a separate budget – neither for women, nor for specific gender equality measures. Rather it is about the gender equality impact of budget policy and of the entire revenues and expenditures of a government. In other words, it is about a gender-equitable budget policy.

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Latest research and publications analysis. The definition and the main practices of gender budgeting in the international perspective were investigated by D. Budlender et al. (2002), D. Budlender (2004), D. Elson (2004). Research on gender budgeting is also highly promoted by international organizations like UN Women (UNIFEM, 2010).

The objects of the research are the two budget programs "Right to permanent financial allowance" and "Right to social assistance benefit" implemented by the Ministry of Labour and Social Policy of Macedonia.

The goal of the article. The purpose is to present the current practices of gender mainstreaming into the budget process in the Republic of Macedonia.

The research methods are abstract and comparative analyses.

Key research findings. The Ministry of Labour and Social Policy of Macedonia (MLSP), Sector for Equal Opportunities in January 2009 launched the implementation of a one-year programme aimed at the promotion and introduction of gender perspective in social policy and in budgeting policies and processes.

The objective of the programme, the first pilot programme at the national level in the South Eastern Europe, was to initiate the process of incorporation of gender perspectives in budget policies at national level, leading to proper and gender responsive allocation of resources, better transparency and accountability of public budget in terms of gender equality.

In FYR Macedonia, national commitment towards gender equality are laid down in the Law on Equal Opportunities for Women and Men adopted in 2006 (Law of FYR of Macedonia, 2006), and the National Action Plan for Gender Equality 2007–2012 (Plan). The Plan stipulates the "inclusion of methods of gender budgeting at national and local level" as a cross-sectoral approach to be pursued in all of its 10 strategic areas of action. The Ministry of Labour and Social Policy is the key institution responsible for the implementation of government policies in the field of employment, social protection and equal opportunities. The Ministry has specific responsibilities stipulated in the Law on Equal Opportunities of promoting the equal status of women and men in all fields and gender mainstreaming in government policies, programs and strategies.

In order to achieve the set objectives we have analyzed the materials to determine whether and to which extent gender issues are covered in:

- policies defined in specific strategic documents;
- programmes arising from the adopted laws;
- action plans and operational programmes;
- interviews with relevant persons from corresponding institutions;
- budgets that accompany such policies.

Two of the programs analysed were "Right to permanent financial allowance" and "Right to social assistance benefit". The scope of gender analysis included two categories of social welfare: beneficiaries' right to permanent financial allowance², and to social assistance benefit³ respectively.

² Cash allowance for persons socially at risk who are incapable of work and are not eligible for any other income benefits.

³ The right can be exercised by able bodies, socially insecure people, who under some regulations cannot provide basic income.

As regards the first program analysed – "Right to permanent financial allowance", in accordance with the Law on Social Protection of Macedonia, the beneficiaries of this type of social welfare are clearly defined 6 categories of persons who are socially at risk and incapable of work. The persons in question are: persons with moderate, severe and most severe intellectual disabilities, persons with physical disabilities, single mother during pregnancy, one month prior to delivery, single parent up to 3 years age of the child, children up to the age of 15 or 26, until it receives regular education, and women and men above 65 years of age.

A person socially at risk shall be a person who has no income or whose household income from all sources is lower than the amount of permanent financial allowance. The amount of permanent financial allowance is fixed to the amount of average monthly net salary per employee in the Republic of Macedonia realized in the preceding year, where the basic financial allowance for an individual right holder amounts to 20% of the average salary, i.e., 3219 denars, for a right holder with one cobeneficiary it amounts to 28% or, 4507 denars, and for a right holder with two or more cobeneficiaries it amounts to 40%, or 6438 denars (Ministry of Labour and Social Policy of Macedonia, 2009).

The procedure governing the exercise of the right to permanent financial allowance is similar to the procedure governing other social welfare rights. In particular, the procedure is initiated upon a citizen request, i.e., by his/her legal representative/guardian. A centre for social work in an area of permanent residence of the applicant decides on an request in the first instance.

Beneficiaries that can receive permanent financial allowance range from persons with intellectual or physical disabilities to single mothers during pregnancy and one month following the delivery. But due to the lack of structured and systematized data on beneficiaries, disaggregated by the grounds for eligibility for this support, it was not possible to find out how many of them are, for instance, persons with moderate, severe and most severe intellectual disabilities, or how many of them are single pregnant mothers one month prior to delivery. However, the experiences of social workers dealing with these issues in the centres for social work lead to the conclusion that in most cases the requests for exercising this right were made by men.

Based on the results of the analyses performed the following conclusions could be made regarding the program "Right to permanent financial allowance":

1. There is no system for collection, updating and analysis of data on the beneficiaries of the right to permanent financial allowance. This includes the lack of structured data with disaggregation of beneficiaries according to the eligibility grounds, as well as a lack of disaggregated analytical data in terms of gender, age, education, place of residence, ethnic background. Providing such data on beneficiaries would provide policy developers with a clearer picture and enable them properly quantify the planned activities aimed at different categories of beneficiaries, and with a sound basis for budgeting for this type of social welfare.

2. Social policy, in the part concerning social welfare, is not giving sufficient consideration to gender inequalities, which still have deep implications on citizens' social status.

3. There is a necessity of substantial incorporation of the gender perspective in formulation, implementation and impact assessment of social welfare policies, in

order to enable it to meet different needs and interests of beneficiaries. Single parents belong to a vulnerable category which is entitled to exercise this right in the first 3 years of a child's life, and only for the first 3 children. As a result of this, it's a common practice among single parents to substitute permanent financial allowance with social assistance benefit upon the expiry of the three-year period.

4. Systematic efforts are required to amend such provisions that impose restrictions for single parents and their children, and to introduce specific benefits to facilitate their access to specific services (kindergartens and nurseries). Child support, when it exceeds 5000 denars per child, still presents a hindrance to the exercise of the right to permanent financial allowance for beneficiaries in the category of single parents of children up to 3 years of age.

Regarding the second program analysed – "Right to social assistance benefit" – it should be noted that the right to social assistance benefit can be exercised by able bodies, socially insecure people, who under some regulations cannot have basic income (UNIFEM, 2010).

The manner of determining the holder of the right to social assistance benefit has been regulated by the Rulebook on the manner of determining the right holder, presenting incomes of a person, family or household when submitting a request for exercising the right and the documentation needed to confirm income (Ministry of Labour and Social Policy, 2008).

According to the Rulebook, the amount of the right to social assistance benefit is determined in % compared to the average monthly net salary per employee in the Republic of Macedonia for the previous year. So, the social assistance benefit per person is 13.5%; for family and household with two members – 17.46%; for family and household with 3 members – 22.23%; for family and household with 4 members – 28.58%; and for family and household with 5 or more members – 33.34%.

The legal opportunity for the engagement of beneficiaries of social assistance benefit for performance of public works up to 5 days in a month, as well as for performance of seasonal works and other temporary works, enables the following: primarily, working engagement of the people and possibility for them to receive amount of compensation bigger than the social assistance benefit amount; secondly, more room is provided for better coordination and cooperation between mayor of local self-government unit, public enterprises and centres for social works. In this context, for instance, if the entities that engage beneficiaries have gender-divided data, then engagements can be planned within the range of offered seasonal and communal works that do not include solely the traditional "men works" which are related to bigger physical strength. Thus, women – beneficiaries of the right to social assistance benefit which cannot be exempted from this engagement as a result of pregnancy or maternity leave, would not find themselves in a situation to refuse engagement which would result in their loss of the right to assistance; and moreover, they can use possible benefits from working engagements.

As regards the social assistance benefit, the following data were revealed (Table 1).

The data in Table 1 shows that in 2004 only 21% of household holders were women, or 13803, as opposed to 53457 men. In 2005, this percentage fell to 19% women as holders of the right to social assistance, or 12939 as opposed to 53979 men,

and in 2006, the statistics was 13011 women, or 20%, as opposed to 53325 men registered as the right holders within households.

Table 1. Average paid amounts of social assistance benefit in 2004–2006, gender segregation (UNIFEM, 2010)

| Year | Expenses per beneficiary, MKD ¹⁾ | Number of households / Total expenses per right holder per gender, MKD | | | | | Participation in percentage, % | |
|------|---|--|-------|----------|-------|-----------|--------------------------------|-----|
| | | Total | Women | Expenses | Men | Expenses | Women | Men |
| 2004 | 2149 | 67260 | 13803 | 29662647 | 53457 | 114879093 | 21 | 79 |
| 2005 | 2186 | 66918 | 12939 | 28284654 | 53979 | 114867312 | 19 | 81 |
| 2006 | 2158 | 66336 | 13011 | 28077738 | 53325 | 115075350 | 20 | 80 |

¹⁾ Macedonian denars.

The following recommendations and conclusions could be made on the basis of the analyses of the program "Right to social assistance benefit":

1. Huge gender disparity among social assistance beneficiaries brings to the conclusion that women and men don't have equal access as holders of the right to social assistance benefit. In order to overcome this situation, employees in the centres for social work should have highly developed awareness of the gender component when making decisions.

2. In order to adjust the undertaken measures to the needs and capacities of beneficiaries, provision of gender-divided data is necessary.

3. Although there are some data on social assistance beneficiaries organized according to different parameters which are of exceptional importance, such as: ethnical origin, economic status of the holder, education, and number of years of receiving social assistance, there is no statistics based on gender. On the other hand, there is a huge lack of analytical data on the profile of social assistance beneficiaries.

4. Employment policies should provide more integration at the labour market for the beneficiaries of social assistance benefit. In that respect, cooperation and coordination between the competent institutions included in this process is necessary, in order to enable balanced access to working engagements to women and men.

Conclusions. The analysis shows that social policy, in parts concerning social welfare, is not giving sufficient consideration to gender inequalities, which still have deep implications on citizens' social status.

The analysis has concluded a lack of system for collection, updating and analysis of data on the beneficiaries of the right to permanent financial allowance. This included the lack of structured data with disaggregation of beneficiaries by the eligibility grounds, as well as lack of disaggregated analytical data in terms of gender, age, education, place of residence, ethnic background.

Great gender disparity among social assistance beneficiaries brought to the conclusion that women and men don't have equal access as the holders of the right to social assistance benefit. Although there were some data on social assistance beneficiaries organized according to different parameters such as: ethnical origin, economic status of the holder, education, and number of years of receiving social assistance, there was no statistics based on gender. On the other hand, there was a huge lack of analytical data on the profiles of social assistance beneficiaries.

Based on the successful implementation and building on the findings and recommendations of the gender budget analysis, the Sector for Equal Opportunities

developed a new, follow-up programme: "Gender Responsive Budgeting as a tool for Gender mainstreaming" to be implemented during 2011–2012. The main goals of the programme were the following:

- development and adoption of Strategy for gender responsive budgeting;
- implementation of the Strategy on GRB through development and implementation of the annual Operational Plan for 2012;
- incorporating gender perspective into active labor market programmes, based on the findings and recommendations from the conducted gender budget analysis.

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Стаття надійшла до редакції 17.11.2014.