

A Study on the Institutionalization of Gender Budgeting (Ⅱ): Drafting a Gender Budget Statement

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Abstract

This study presents the results of a research conducted in 2008 as part of the three-year Gender Budgeting Institutionalization Study Series in Korea launched in 2007. This study focuses on the drafting of "a Gender Budgeting Statement" in 2009, which is composed of four sections; 1) the outline of gender budgeting, 2) the goals of gender budgeting policies and the direction of fiscal management in 2009, 3) the breakdowns of the 2009 Gender Budgeting Statement, and 4) the project explanation from the gender perspective by ministry/agency. In the 2009 Gender Budget Statement, projects are classified into two categories: projects specially targeted for improving gender equality and general projects. Projects for gender equality are identified, sorted, and analyzed. Among the general projects, about 50 are selected and analyzed regarding their impacts on gender equality. This paper concludes with suggestions for further research.

Keywords: institutionalizing gender budgeting, gender budget statement format, gender budget analysis, fiscal management system

1. Introduction

This paper is the result of second year research of the Gender Budgeting Institutionalization Study Series in Korea which began in 2007. In the first year, the research focused on the basics of gender budgeting including the concepts and methodologies of gender budgeting as there were almost no prior research in Korea on gender budgeting.

In early 2008, when this study began, the Korean government carried out a pilot project for drafting a 2009 gender budget statement and started to discuss the guidelines on a gender budget statement, a standardized format of the statement and the principle of selecting projects for gender equality impact analysis, all of which will start being utilized in the fiscal year 2010. However, there were still many works to be done before building the infrastructure for the effective implementation of gender perspective budget: role division among the relevant government ministries and agencies, their coordination and collaboration system, government official training, and gender disaggregated statistics.

Under the circumstances, the second year research placed a greater focus on specific tools and procedures for the successful implementation of gender budgeting within the government.

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Researchers drew up a draft gender budget statement and developed implementation mechanisms for the effective operation of gender budgeting.

This study is to introduce the drafting of a gender budget statement in particular. Researchers have explored for a long time the ideal form of a gender budget statement suitable for the Korean fiscal management system and the original purpose as well as not incurring the excessive administrative costs. We consulted gender budget statements of other countries, with our focus on the Australian federal government's 1991-1992 gender budget statements and the Swedish government's.

Finally, we developed a gender budget statement format and, based on this, drew up a draft gender budget statement to be submitted to the National Assembly by the government. It was prepared based on the 2009 budget statements of 17 ministries and 18 agencies/ offices/ administrations.

2. Gender Budget Statement Format

The gender budget statement format developed by researchers is composed of four sections: 1) the outline of gender budgeting, 2) the goals of gender equality policies and the direction of fiscal management, 3) the breakdowns of 2009 gender budget statements, and 4) the project explanation with gender perspective by ministry/agency. The contents in detail are as follows:

I. Outline of Gender Budgeting

1. Concept of Gender Budgeting
2. Objective and Significance of Gender Budgeting
3. Related Laws and Rationale for Gender Budgeting
4. Expected Results

II. Goals of Gender Equality Policies and Direction of Fiscal Management

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- _. Project Explanation with a Gender Perspective by Ministry/Agency

1. Ministry of Health, Welfare and Family Affairs

1) Goals of Gender Equality Policies and Directions of Fiscal Management

- (1) Goals of Gender Equality Policies
- (2) Policy Results and Directions of Fiscal Management
- (3) Directions for Policies and Fiscal Management in 2009

2) Table of Projects

3) Project Explanation

4) Results of Gender Equality Impact Analysis on General Projects

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Explanations of projects of each ministry and agency are attached below.

3. 2009 Gender Budget Statement (Draft)

As mentioned above, as part of the pilot program, a gender budget statement was drafted based on the 2009 budget statements of 17 ministries and 18 agencies/offices/administrations. According to the gender budget statement format, the 2009 gender budget statement consists of four sections: 1) the overview of gender budgeting, 2) the objective of gender budgeting policies and the direction of Korea's fiscal management in 2009, 3) the breakdown of the 2009 gender budget statement, and 4) the projects explanation with a gender perspective by ministry/agency. Among them, this paper is to introduce the third part: the breakdown of the 2009 draft gender budget statement, which is the most important part of the statement.

III. Breakdown of the 2009 Gender Budget Statement

1. Overview

(Unit: Million Won)

Classification	2009		2008		Fluctuation	Percentage of Fluctuation	Details of Project	
	Proposed Budget	Percentage in Total	Budget	Percentage in Total			Number	Percentage in Total
Projects for Gender Equality	2,533,681	0.77	1,525,462	0.6	1,008,219	66.1	166	2.86
Projects Subject to Gender Equality Impact Analysis	3,531,175	1.07	3,522,281	1.38	8,894	0.25	45	0.77
Total National Budget*	273,874,068		255,295,082		75,578,986	29.6	5,813	100

2. The Breakdown of the Budget for Gender Equality Projects

1) Focus of Budget Allocation

Demographic and social changes including low birth rate, aging population, and women's increasing economic activities have made it impossible to rely solely on individual families or women over the role of care-givers for children and the elderly. To ease the burden of childrearing, the number of beneficiaries entitled to the day-care subsidies should be increased and the quality of day-care service should be improved.

A decrease in the total economically active population made women's economic activities and the best use of female human resources an indispensable part of national competitiveness. Women's economic activities should improve through various ways like helping women with career breaks to develop work capacity, supporting their job seeking efforts, and fostering women in technology and engineering fields.

Violence toward women including sexual assault, domestic violence, and prostitution is a crime that not only inflicts mental and physical pain on the victims but also incurs tremendous costs to the entire society. Domestic and sexual violence should be prevented, and comprehensive protection and support services for the victims should be reinforced. Systematic program(s) to help women in prostitution to stand on their own feet and escape from prostitution should be implemented.

Women in the vulnerable social classes including low income single parents and females with disabilities face double and triple discrimination caused by social prejudices. Continuous provision of welfare finance for those women should support them to enjoy their lives as full-fledged members of our society.

2) By Competent Authorities

(Unit: Million Won)

Competent Authority	2009		2008		Fluctuation	Percentage of Fluctuation	Details of Project	
	Proposed Budget	Percentage in Total	Budget	Percentage in Total			Number	Percentage in Total
Ministry of Strategy and Finance	32,851	1.3	0	0	32,851	-	8	4.8
Ministry of Education, Science and Technology	7,235	0.3	3,315	0.2	3,920	118.3	6	3.6
Ministry of Foreign Affairs and Trade	0	0	0	0	0	-	0	0
Ministry of Unification	0	0	0	0	-	0	0	
Ministry of Justice 2,888	0.1	8,723	0.6	5,835	66.9	2	1.2	
Ministry of National Defense	0	0	0	0	0	-	0	0
Ministry of Public Administration and Security	0	0	0	0	0	-	0	0
Ministry of Culture, Sports and Tourism	0	0	300	0	300	100	0	0
Ministry of Food, Agriculture, Forestry and Fisheries	40,648	1.6	0	0	40,648	-	2	1.2

Ministry for Health, Welfare and Family Affairs	1,965,973	77.6	1,174,353	77	791,620	67.4	62	37.3
Ministry of Environment	0	0	0	0	0	-	0	0
Ministry of Labor	396,670	15.7	255,358	16.7	141,312	55.3	18	10.8
Ministry of Gender Equality	77,901	3.1	75,419	4.9	2,482	3.3	64	39.6
National Tax Service	2,367	0.1	1,413	0.1	954	67.5	1	0.6
Public Procurement Service	186	0	186	0	0	0	1	0.6
Korea National Statistical Offices	0	0	0	0	0	-	0	0
National Emergency Management Agency	0	0	0	0	0	-	0	0
Rural Development Administration	0	0	0	0	0	-	0	0
Korea Forest Service	0	0	0	0	0	-	0	0
Small and Medium Business Administration	5,445	0.2	4,950	0.3	495	10	1	0.6
Korean Intellectual Property Office	1,517	0.1	1,445	0.1	72	5	1	0.6
Korea Food & Drug Administration	0	0	0	0	0	-	0	0
Korea Coast Guard	0	0	0	0	0	-	0	0
Multifunctional Administrative City Construction Agency	0	0	0	0	0	-	0	0
Ministry of Patriots and Veterans Affairs	0	0	0	0	0	-	0	0
Total	2,533,681	100	1,525,462	100	1,008,219	66.1	166	100

In the total budget for the projects for gender equality, the Ministry for Health, Welfare and Family Affairs takes up the largest portion, 1 trillion and 965.9 billion KRW, or 77.6 percent of the total budget. This was followed by the Ministry of Labor whose budget stands at 396.6 billion KRW, or 15.7 percent.

The Ministry of Gender Equality, the main competent authority of gender equality policies, is allocated with 77.9 billion KRW, or 3.1 percent of the total budget.

3) By Functions

(Unit: Million Won)

Functions	2009		2008		Fluctuation		Details of Project	
	Proposed Budget	Percentage in Total	Budget	Percentage in Total			Number	Percentage in Total
General Public Administration	2,553	0.1	1,599	0.1	954	59.7	∞	1.2
Public Order & Security	2,888	0.1	8,723	0.6	_5,835	_66.9	2	1.2
Unification/Foreign Affairs	0	0	0	0	0	-	0	0
National Defense	0	0	0	0	0	-	0	0
Education	4,772	0.2	1,115	0.1	3,567	328	5	3
Culture & Tourism	0	0	300	0	_300	_100	0	0
Environment Protection	0	0	0	0	0	-	0	0
Social Welfare 2,457,315	97	1,495,910	98.1	961,405	64.3	149	89.8	
Health 16,080	0.6	9,200	0.6	6,880	74.8	3	1.8	
Agriculture, Forestry and Fisheries	40,648	1.6	0	0	40,648	-	2	1.2

Industry/SME	6,962	0.3	6,395	0.4	567	8.9	2	1.2
Transportation & Traffic	0	0	0	0	0	-	0	0
Land & Community Development	0	0	0	0	0	-	0	0
Science & Technology	2,513	0.1	2,220	0.1	293	13.2	1	0.6
Total	2,533,681	100	1,525,462	100	1,008,219	66.1	166	100

Among the total budget for the projects for gender equality, the social welfare sector accounts for 2 trillion and 457 billion KRW, or 97 percent, followed by the agriculture, forestry and fisheries sector with 40.6 billion KRW, or 1.6 percent.

4) By Objectives of the Gender Equality Master Plan

(Unit: Million Won)

Objectives	2009		2008				Details of Project	
	Proposed Budget	Percentage in Total	Budget	Percentage in Total	Fluctuation	Percentage of Fluctuation	Number	Percentage in Total
Active Participation in the State Affairs	6,599	0.3	723	0	5,876	0.6	7	4.2
Reinforcement of Health and Welfare	54,657	2.2	19,941	1.3	34,716	3.4	24	14.5
Promotion of Human Rights	48,416	1.9	40,356	2.6	8,060	0.8	22	13.3
Reinforcement of Economic Capacity	541,140	21.4	253,748	16.6	287,392	28.5	29	17.5
Social Burden Sharing of Care Work	1,832,539	72.3	1,144,714	75	687,825	68.2	37	22.3
Social Unity and Gender Equality Promotion	36,815	1.5	29,853	2	6,962	0.7	27	16.3
Others	13,515	0.5	36,127	2.4	22,612	2.2	20	12
Total	2,533,681	100	1,525,462	100	1,008,219	100	166	100

Among all projects for gender equality, by objectives of the gender equality master plan, the social burden sharing of care work tops the list with 1 trillion and 832.5 billion KRW, or 72.3 percent of the total. And the next largest portion of budget is allocated to the objective of reinforcement of economic capacity with 541.1 billion KRW, or 21.4 percent. Reinforcement of health and welfare and promotion of human rights take up 2.2 percent and 1.9 percent, respectively, of the total gender equality budget.

3. Gender Equality Impact Analysis of General Projects

1) By Competent Authorities

(Unit: Million Won)

Competent Authorities	2009		2008				Details of Project	
	Proposed Budget	Percentage in Total	Budget	Percentage in Total	Fluctuation	Percentage of Fluctuation	Number	Percentage in Total
Ministry of Education, Science and Technology	515,452	14.60	465,642	13.22	49,810	10.70	3	6.67
Ministry of Foreign Affairs and Trade	287,200	8.13	302,000	8.57	14,800	4.90	1	2.22
Ministry of Unification	51,049	1.45	45,225	1.28	5,824	12.88	1	2.22

Ministry of Justice	30,481	0.86	29,409	0.83	1,072	3.65	2	4.44
Ministry of National Defense	13	0.00	431	0.01	418	96.98	2	4.44
Ministry of Public Administration and Security	89,978	2.55	91,158	2.59	1,180	1.29	2	4.44
Ministry of Culture, Sports and Tourism	10,630	0.30	9,070	0.26	1,560	17.20	2	4.44
Ministry of Food, Agriculture, Forestry and Fisheries	342,259	9.69	273,402	7.76	68,857	25.19	7	15.56
Ministry for Health, Welfare and Family Affairs	202,220	5.73	186,216	5.29	16,004	8.59	5	11.11
Ministry of Environment	5,643	0.16	5,653	0.16	10	0.18	2	4.44
Ministry of Labor 60,600	1.72	57,437	1.63	3,163	5.51	2	4.44	
Public Procurement Service	1,002	0.03	1,074	0.03	72	6.70	2	4.44
Korea National Statistical Office	2,020	0.06	2,790	0.08	770	27.60	1	2.22
National Emergency Management Agency	6,800	0.19	6,800	0.19	0	0.00	1	2.22
Rural Development Administration	9,337	0.26	13,428	0.38	4,091	30.47	3	6.67
Korea Forest Service 50,641	1.43	63,848	1.81	13,207	20.69	1	2.22	
Small and Medium Business Administration	48,430	1.37	277,600	7.88	229,170	82.55	3	6.67
Korean Intellectual Property Office	1,132	0.03	944	0.03	188	19.92	1	2.22
Korea Food & Drug Administration	528	0.01	563	0.02	35	6.22	1	2.22
Korea Coast Guard 7,942	0.22	1,575	0.04	6,367	404.25	1	2.22	
Multifunctional Administrative City Construction Agency	666	0.02	666	0.02	0	0.00	1	2.22
Ministry of Patriots and Veterans Affairs	1,807,152	51.18	1,687,350	47.91	119,802	7.10	1	2.22
Total	3,531,175	100.00	3,522,281	100.00	8,894	0.25	45	100.00

When it comes to the number of project subject to gender equality impact analysis, the Ministry of Food, Agriculture and Fisheries has the highest number, 7 projects, followed by the Ministry for Health, Welfare and Family Affairs with 5 projects and the Ministry of Education, Science and Technology and the Rural Development Administration each with 3 projects. In addition, the Ministry of Environment, the Ministry of Labor and the Ministry of National Defense each has 2 projects.

In regard of the percentage in the total budget of projects subject to analysis, the Ministry of Patriots and Veterans Affairs accounts for the largest portion, 51.2 percent. The next one goes to the Ministry of Education, Science and Technology with 14.6 percent, followed by the Ministry of Foreign Affairs and Trade with 8.1 percent.

2) By Functions

(Unit: Million Won)

Functions	2009		2008		Fluctuation		Details of Project	
	Proposed Budget	Percentage in Total	Budget	Percentage in Total			Number	Percentage in Total
General Public Administration	3,022	0.08	3,864	0.11	842	21.79	3	5.88
Public Order & Security	37,459	1.04	36,521	1.02	938	2.57	4	7.84

Unification/Foreign Affairs	338,249	9.41	347,225	9.68	_8,976	_2.59	2	3.92
National Defense	13	0.00	431	0.01	_418	_96.98	2	3.92
Education	275,452	7.66	276,076	7.70	_624	_0.23	2	3.92
Culture & Tourism	10,630	0.30	9,070	0.25	1,560	17.20	2	3.92
Environment Protection	13,585	0.38	7,228	0.20	6,357	87.95	3	5.88
Social Welfare	2,065,940	58.51	1,927,643	54.73	138,297	7.17	7	15.56
Health	4,560	0.13	3,923	0.11	637	16.24	2	3.92
Agriculture, Forestry and Fisheries	402,237	11.39	350,678	9.96	51,559	14.70	11	24.44
Industry/SME	101,762	2.83	321,644	8.97	_219,882	_68.36	5	9.80
Transportation & Traffic	89,800	2.50	90,846	2.53	_1,046	_1.15	1	1.96
Land & Community Development	666	0.02	666	0.02	0	0.00	1	2.22
Scientific Technology	240,000	6.68	189,566	5.28	50,434	26.60	1	1.96
Total	3,531,175	100.00	3,522,281	100.00	8,894	0.25	45	100.00

By functions, the field of agriculture, forestry and fisheries holds the largest with 11 projects. In the field of social welfare, there are 7 projects. The industry/SME sector and the public order & security sector have 5 and 4 projects, respectively.

With respect to the percentage in all projects subject to gender equality impact analysis, the social welfare field accounts for the largest portion of 58.5 percent, followed by agriculture, forestry and fisheries with 11.4 percent and industry/SME with 2.8 percent.

3) By Objectives of the Gender Equality Master Plan

(Unit: Million Won)

Objectives	2009		2008				Details of Project	
	Proposed Budget	Percentage in Total	Budget	Percentage in Total	Fluctuation	Percentage of Fluctuation	Number	Percentage in Total
Active Participation in the State Affairs	3,022	0.09	3,864	0.11	_842	_21.79	3	5.88
Reinforcement of Health and Welfare	158,968	4.50	147,606	4.19	11,362	7.70	7	15.56
Promotion of Human Rights	27,594	0.78	27,892	0.79	_298	_1.07	2	3.92
Reinforcement of Economic Capacity	2,789,584	79.00	2,775,089	78.79	14,495	0.52	22	48.89
Social Burden Sharing of Care Work	47,402	1.34	48,191	1.37	_789	_1.64	1	2.22
Social Unity and Promotion of Gender Equality	345,181	9.78	352,115	10.00	_6,934	_1.97	4	7.84
The Rest	159,424	4.51	167,524	4.76	_8,100	_4.84	6	13.33
Total	3,531,175	100.00	3,522,281	100.00	8,894	0.25	45	100.00

When classified by the objectives of the gender equality master plan, the number of projects having potential for reinforcement of economic capacity stands at 22, accounting for 48.9 percent of the total budget. The number of projects related to the reinforcement of health and welfare amounts to 7, or 15.6 percent.

In terms of percentage in the total projects subject to analysis, the projects related to the reinforcement of economic capacity also take up the largest portion of 79 percent.