



Taighde, Idirphlé, Comhairle
Research, Dialogue, Advice

Equality Budgeting in Ireland: The Equality Budgeting Expert Advisory Group

Helen Johnston, National Economic and Social Council

7th Annual Meeting of the OECD Gender Budgeting Network: Intersectional Analysis and how NGOs can help, 14th June 2023, Charlemont Hilton Hotel, Dublin

Outline

- Overview of the Equality Budgeting Expert Advisory Group
- Some key themes
 - Performance Reports
 - Data
 - OECD Scan
- Poverty Proofing & Social Impact Assessments
- Concluding Observations

Equality Budgeting Expert Advisory Group (1)

- **Established in September 2018**

- Commitment in the Programme for Government (2016) to *‘develop the process of budget and policy proofing as a means of advancing equality, reducing poverty and strengthening economic and social rights’*
- Builds on Social Impact Assessments
- Equality Budget Pilot launched in 2018
- Part of Performance Budgeting

- **Meetings**

- To meet 3 to 4 times per year
- Has met 13 times

Equality Budgeting Expert Advisory Group (2)

- **Membership**

- Chaired by a senior official at the Department of Public Expenditure and Reform (DPER)
- Senior officials from the Departments of Finance, Justice and Equality, and Social Protection
- Senior statistician from the Central Statistics Office
- CEO of Irish Human Rights and Equality Commission
- Head of Policy at the National Women's Council of Ireland
- Head of the Social Research Division at the Economic and Social Research Institute
- Senior social policy analyst at the National Economic and Social Council
- Head of Applied Social Studies at Maynooth University
- Director of the National Disability Authority
- Secretariat from the Performance and Budgeting Unit in DPER

Equality Budgeting Expert Advisory Group (3)

- **Remit:**

- The role of the group is to provide advice and guidance to departments on the most effective way to advance and develop equality budgeting going forward

- **What is equality budgeting?**

- Equality budgeting involves providing information on the likely impact of proposed and/or ongoing budgetary measures, which, in turn, enhances the potential to better facilitate the integration of equality concerns into the budgetary process and enhance the Government's decision-making framework
- It is about moving on from separate budget lines for specific equality measures to the equality impact of the overall budget policy

Public Service Performance Reports (1)

- Performance reporting was introduced across all areas of public expenditure in 2012
- Equality budgeting introduced to Performance Reports in 2018
- *‘a process in which the budget is recognised as something more than a neutral process of resource allocation but is considered a value laden process that embodies – and potentially informs and influences – long standing societal choices about how resources are deployed’*



An Roinn Caiteachais
Phoiblí agus Athchóirithe
Department of Public
Expenditure and Reform

Public Service Performance Report 2019

July 2020

Public Services in 2019 – at a Glance

Population of Ireland
was **4.9 million**



1,544,374 people
covered by a
Medical Card



2.36 million people
in employment(Q4
2019)



347,547 average
weekly Payments of
Illness, Disability &
Carer's Benefit



2,077 Projects
supported by the
LEADER Programme



14,307
Members of
An Garda Síochána



108,198 children
enrolled in the ECCE
preschool programme



936,940 Students
provided with primary &
post-primary education



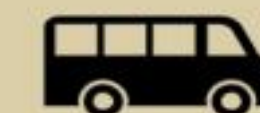
1,785 Defence
Forces Personnel
deployed overseas



36.6% of electricity
demand generated from
renewable resources



913,971
new Leap Cards
issued



1,857 Irish citizens in
distress received
consular assistance
abroad



Public Service Performance Reports (2)

The Minister for Public Expenditure speaking about the PSP Report, 2021

‘The Public Service Performance Report is a key budgetary report that provides clear and focused information on how public funds are being utilised and their impact on everyday life. This focus on performance is targeted at supporting budgetary discussions on the effectiveness and efficiency of the totality of Government expenditure rather than just the incremental increase each year.’

An update on Equality and Green Budgeting, which are integrated into the Performance Budgeting framework, is included in the report. There are now twelve Government Departments actively engaged with Equality Budgeting. Following Government agreement to establish an interdepartmental working group, I look forward to this important area of work being further developed taking account of the ongoing work in relation to developing a Wellbeing Framework for Ireland.’

Data (1)

- Data sub-group set up
- Data audit undertaken
- National Equality Data Strategy 2023-2027
 - Announced in March 2022
 - Led by CSO & Department of Children, Equality, Disability, Integration and Youth
 - To improve the collection, disaggregation and use of equality data
 - Cross-government strategy
 - Consultation with departments, agencies and civil society organisations

Data Audit 2020

- Undertaken by the CSO for the Equality Budgeting Expert Advisory Group
- Assessed data availability for each dimension of equality:
 - gender, age, marital status, family status, disability, sexual orientation, race, religion, membership of the Traveller community
- Key findings:
 - Age & sex is well collected
 - Quality gaps for ethnicity, race, Irish Travellers, religion, disability (standard definition not used)
 - Collection gaps for gender identity and sexual orientation
- CSO to create an Equality Hub

OECD Scan: Equality Budgeting in Ireland

- Undertaken in June 2019
- 8 strengths identified
 - High on the political agenda, high profile developments, a range of national strategies, strong institutional framework, equality budgeting on the radar of government departments, builds on the performance budgeting framework, use of IGEEES services, SWITCH model & social impact assessment, parliamentary interest
- 9 challenges identified
 - Breadth of equality, lack of an overarching equality strategy, current approach limited, no legal framework or guidance, limited incentives, limited competence & capacity, impact limited, information inadequacies
- 12 recommendations
 - Actions to link to national/international equality goals, as part of performance budgeting, establish a network of equality budgeting contact points with training, equality budgeting statement with the Budget, tagging of expenditure for equality, green & SDG budgeting, expand operational tools, e.g. equality proofing, tax dimension as well as expenditure, develop an equalities data strategy, communication, instructions & incentives, legal foundations should be considered

Poverty Proofing & Social Impact Assessment

- Introduced in 1998, on foot of the National Anti-Poverty Strategy (1997)
- *‘The process by which government departments, local authorities and state agencies assess policies and programmes at design and review stages in relation to the likely impact they will have or have had on poverty **and on inequalities likely to lead to poverty** with a view to poverty reduction’*
- Guidelines for its implementation & training
- A number of reviews undertaken
 - Poverty impact assessment – 2 stage, 7 step process (consultation, aims & target groups, data & research, assessing impacts, decision & monitoring, publication, summary sheet)
 - Pilot of a more integrated proofing tool – gender, poverty, inequality
 - Now social impact assessment – *an evidence-based methodology to estimate the likely distributive effects of policy proposals on income and social inequalities, which builds on the practice of poverty impact assessment*

Poverty proofing - Some lessons

- Has raised awareness
- Need to move beyond a 'box tick' exercise
- Importance of guidelines, training, data
- Involvement of those affected in the process
- Transparency
- Complexity of intersectionality ... socio-economic status as a tenth ground?
- Has it made a difference?

Concluding Observations

- Importance of advancing equality budgeting At a range of levels
- Need for good quality data
- Need for resourcing and capacity building
- Need for co-ordination Especially in relation to intersectionality
- Potential of the wellbeing framework?
- We are all on a learning curve



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Thank you

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