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## **Government budgets and the promotion of gender equality in Japan and South Korea**

Reina Ichii, RMIT, Melbourne

Rhonda Sharp, University of South Australia, Adelaide

### **Abstract**

*This paper will focus on key aspects of attempts to link gender equality policies and government budgets in Japan and South Korea. Japan's Act for gender equality provides for gender impact assessment. This has enabled it, on occasions, to integrate a gender perspective into some important policy processes, but the links with the funding decision-making processes are weak. In contrast, South Korea has a financial law that directly links the budget with its gender equality policies. The 2006 Financial Act mandated the integration of a gender perspective, including a gender budget statement into budgetary processes but this does not always contribute to policy changes that promote gender equality. The findings help us understand the strengths and weaknesses of different approaches to integrating gender equality and women's empowerment into planning, policy and budgetary processes and outcomes.*

**Keywords:** government budgets, Japan, South Korea, public policy, gender equality, gender mainstreaming

### **1. Introduction**

In 1995 the UN Fourth World Conference for Women recognised in the Beijing Platform of Action the importance of integrating a gender perspective into all public policy and budgeting processes. By 2007 over 90 developing and developed countries had undertaken some steps towards making budgets more gender responsive (UNIFEM 2008: 42). By seeking to 'mainstream gender' into government spending and revenue raising, gender-responsive budgeting (GRB) strategies explicitly recognise that resourcing is central to the implementation of policies that seek to promote gender equality and the empowerment of women.

There is however no 'blueprint' for making policy and budgets gender- responsive and in

practice a variety of approaches have emerged. An extensive literature exists indicating that gender-responsive budgeting initiatives are differentiated by their institutional processes, participants and politics, along with the methodologies and tools used to assess the impacts of budgets and policies on different groups of men and women and boys and girls (Budlender and Sharp 1998; Budlender et al 2002; Elson 2004; Elson and Sharp 2011). What are less understood are the processes by which gender equality and women's empowerment can be made an integral, rather than a separate, aspect of the planning, policy and budgetary processes and outcomes of a country. This process is described by UN Women as the challenge of 'institutionalising' gender-responsive budgeting (Alami 2008: 8). It requires an understanding of what enables particular initiatives to be more successful than others in translating a commitment to gender equality into actions and outcomes on a sustainable basis.

A stronger engagement with the theory and practice of gender mainstreaming has been called for in order to develop successful strategies to change budgetary priorities and policies to promote gender equality (Sharp 2002). Such an approach however does not provide ready-made answers as there is no consensus on the failure, or the success, of gender mainstreaming internationally (Moser and Moser 2005). In her overview of the critiques of gender mainstreaming, Walby (2005a, 2005b) frames gender mainstreaming as a contested concept and practice, encapsulating key tensions and debates in feminist theory and practice. As such it offers opportunities 'to recast debates and contribute to new understandings' (Walby 2005b: 321).

Gender mainstreaming is sometimes cast as a technical process and sometimes a political process. But Walby (2005b:333) argues that expertise and democratic participatory processes can work together in a way that is complementary rather than in contradiction. GRB as technical- expert, as utilising as set of tools to achieve efficient and equitable resource allocations while stakeholders are assumed to share a set of policy goals is reflected in many manuals seeking to give guidance on 'how to do GRB' (see, for example, Budlender and Sharp 1998; UNFPA and UNIFEM 2006; Quinn 2009). But is important to avoid the tendency towards what Daly (2005) terms 'technocratisation' of gender mainstreaming strategies because it ignores the structural nature of gender inequality and the need to contest gender power relations, among other things. Analyses of GRB as a political process highlight the need for activists and policy makers both inside and outside the state to contest budgets and policies (Bakker 2002; Sharp and Broomhill 2002). There is a growing GRB literature that points to the effectiveness of intertwining technical expertise and budgetary politics in the form of democratic participatory activities that give a voice to women (Himmelweit 2002; Bakker 2007; Sharp 2007; Sharp and Broomhill 2002). Also, the representation of GRB as being based on expertise may itself be a political strategy. The UK Women's Budget Group, an NGO deliberately positions itself as economically and technically expert as a means of giving a voice to the economic concerns of women and marginalised groups especially within Ministries of Finance

(Walby 2005b; Rake 2002)

In this paper we adopt these insights from the gender mainstreaming literature to compare the relative successes of two East Asian countries where there has been an engagement by women with gender policies and budget issues for a decade or more. We focus particularly on the 2006-2011 pilot GRB project in Republic of Korea (South Korea) and the initiatives the Japanese government undertook between 2002-2010. In both Japan and Korea GRB has been promoted by women's NGO's as a strategy for translating government commitments to gender equality and women's rights into concrete results. In these two countries two different approaches have emerged. In South Korea the government has legally committed to GRB by mandating its implementation in the *National Financial Act 2006*. A comparison that includes South Korean experiences is significant because not many countries in the Asia Pacific region have adopted a financial law for mandating GRB. In contrast, Japan has not established a law mandating GRB but it has taken some steps to link the government's gender equality policy (set out in the Basic Plan for Gender Equality) to budgeting issues and has conducted gender impact analyses on aspects of taxation, social security and employment policies.

We examine four aspects of gender-responsive budgeting strategies to compare Japan and South Korea. The first two will highlight the political processes that underpin the different gender-responsive budgeting strategies by examining firstly the role of women's non-governmental organisations, and secondly the role of parliament. The second two focus on the analyses and tools (the more technical-expert elements) adopted by the two countries, by examining firstly gender impact analyses of policies and programs, and secondly the government's formal statement linking its budget to gender equality. We argue that both the policy-oriented approach of gender budget advocates in Japan and the South Korean government's legislative approach have had some success in bringing about policy and budgetary changes but their success has been constrained to the extent to which actors have achieved a complementarity between the technical-expert and political-participatory aspects of GRB.

## **2. Gender equality and budgeting in Japan**

While the Japanese government has not formally undertaken a GRB initiative, it undertakes some steps to link gender equality policies and budgets.<sup>1</sup> For example, since 2002 government expenditure on gender equality programs under the Basic Plan for Gender Equality has been

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<sup>1</sup> The government does not acknowledge GRB as one of its gender equality strategies (email communication with the Gender Equality Bureau officials, 31 August 2010).

released as appendices of its *White Paper on Gender Equality*. The national government also established a specialist committee on gender impact assessment and evaluation under the Council for Gender Equality, which examines the impacts of specific programs, institutions and practices from a gender perspective, and this analysis has led to some policy and funding changes. In addition, women's NGOs have initiated some GRB awareness-raising activities. For example, in 2005 when the government drafted the Second Basic Plan for Gender Equality, NGOs proposed the implementation of GRB. However, this was not included in the Second Plan. Then NGOs lobbied more proactively for the implementation of GRB in the Third Basic Plan for Gender Equality (2011–2016). This resulted in a brief paragraph in the plan signalling a study of gender-responsive budgeting along with gender-disaggregated statistics (Gender Equality Bureau 2010a).

### **2.1. The role of women's NGOs**

Engagement with government budgets is relatively new for women's NGOs, as budgetary matters have been addressed almost exclusively by Japan's business federation and a parliament dominated by men (Osawa et al. 2002: 146–147). Since the successful passing of a range of equity-focused legislation in the 1990s, new types of NGOs have emerged to take up gender equality as a core issue. This has occurred against a background of persistent economic stagnation with rising poverty (in particular among the young and women), an ageing population along with the world's lowest fertility rate, rising women's labour participation with unequal working conditions, austerity budgetary policies (the accumulated public deficits are twice the Japanese GDP) and the external influence of the UN World Women's Conferences. In this environment, dynamic linkages and dialogue among the government, parliament and civil/NGO sectors have been forged.

Several women's NGOs have undertaken GRB-related activities, mainly focusing on advocacy. For example, the Ichikawa Fusae memorial association, named after the pioneering Japanese suffrage activist, MP Ichikawa Fusae, organises an annual hearing on the national budget regarding policies and programs related to women in conjunction with the Nihon fujin yukensya domei (League of Women Voters of Japan). Policy makers in four ministries are invited to the hearing to speak about proposed policies and funding related to gender equality in the coming financial year. In 2011 the association ran a workshop for NGOs to build capacity in gender budget analysis and monitoring.

Another women's umbrella organisation, Peking JAC<sup>2</sup>, lobbies the national government to

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<sup>2</sup> Peking JAC stands for Japan Accountability Caucus for the Beijing Conference. This nation-wide NGO

ensure the implementation of the Beijing Declaration and Platform for Action. This NGO was established by activists, academics and parliamentarians in 1995, after the fourth UN World Conference on Women was held in Beijing. The NGO also lobbies parliamentarians and officials in political parties. In 2007 PJAC members developed a plan for undertaking gender-responsive budget analysis. But progress has been slow due to the volunteer nature of this group and a lack of resources.

In 2008 the first comprehensive gender budget analysis was undertaken by Japanese Women's Watch (JAWW).<sup>3</sup> Their analysis included government budgets at the national and local levels (Japanese Women's Watch 2008). One concern was the budget cuts to gender equality programs at the national and local levels after 2001. These budget cuts affected the income of women's NGOs, which had previously received governments' subsidies.<sup>4</sup> Alternative sources of income for many of these groups, such as membership fees, remain limited (many members are part-time workers and/or retirees and have low incomes), affecting their viability. The budget analysis also included the taxation and social security systems, and recommendations for making these more equitable. The findings were presented at government-NGO dialogues and a NGO forum at the 52nd session of the UN Commission on the Status of Women in 2008.

These GRB-related activities undertaken by women's NGOs have increased awareness of the importance of gender analysis of policies and budgets. In the lead-up to the formulation of the Third Basic Plan for Gender Equality, lobbying and analysis by the NGOs put pressure on the national government to include gender-responsive budgeting in the plan. However, in the context of the strong 'anti-feminist' backlash mounted by politicians from the Liberal Democratic Party, Jinja Honcho (Association of Shinto Shrines) and conservative academics seeking to repeal the law on gender equality, prohibit the use of maiden names by married women and the abolition of gender-equal education<sup>5</sup>. Women's groups and their supporters

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consists of 14 regional caucus and thematic caucus. The information on their activities is available on their Japanese website: [http://pekinjac.or.tv/about\\_beijingjac/index.html](http://pekinjac.or.tv/about_beijingjac/index.html)

<sup>3</sup> JAWW was established in 2001 to monitor the government's implementation of the Beijing Platform for Action. In collaboration with Asia Pacific Women's Watch (APWW), JAWW undertakes a range of activities including lobbying governments and the United Nations. Detailed information is available on their website: <http://www.apww-slwnog.org/> (accessed 20 October 2011).

<sup>4</sup> Dales (2009: 27) reports that the allocation of government funds to promote women's affairs expanded as part of the ratification of CEDAW in 1985 and the *Basic Law for Gender Equality* in 1999. Between 1990 and 2004, 185 women's centres funded by local governments were established throughout Japan.

<sup>5</sup> In 1995 Prime Minister Shinzo Abe formulated a project team within LDP undertaking a survey and symposium about excessive sexual education and gender-equal education. PM Abe and the team members are strongly against the introduction of gender equality perspectives in the school educational curriculum (e.g. productive and reproductive issues are included in human rights education at school.)

have been engaged in 'holding the line' against regressive changes (Bulbeck 2008: 70). The women's NGOs elicited support from the Minister for Gender Equality, MP Fukushima Mizuho, who recognised that dialogues with women's NGOs were critical to the successful formulation of the plan. She was persuaded of the importance of gender-responsive budgeting for the plan's implementation and the recommendation for a GRB study was included in the Third Basic Plan for Gender Equality. This was a valuable outcome of GRB-related activities conducted by women's NGOs as well as the dialogues between NGOs and government. However, the Basic Plan for Gender Equality is not legally binding.

## 2.2. The role of parliament

Japanese women are relatively poorly represented in parliament with women holding 10.6 per cent of lower house seats, ranking Japan 113 out of 145 countries in 2009 (Inter-Parliamentary Union 2009). However, as Eto (2010) reports, significant gains have been made at the municipal level. Despite their small numbers woman MPs have formed cross-party caucuses on certain issues such as *the Law for Prevention of Spousal Violence and the Protection of Victims* introduced in 2001, and women MPs often form networks within their respective parties and/or across parties to engage with the women's movement.

While collaborations between women parliamentarians and Women's NGOs have been important, strategic alliances also took place between women parliamentarians and the government to enact the *Basic Act for Gender Equality* during the mid-1990s Prime Minister Hashimoto Ryutaro recognised that establishing a gender-equal society was central to implementing structural reform in Japan (Osawa 2007: 79). A couple of female political leaders pushed the government to introduce legislation related to women as a condition of joining the Hashimoto coalition government. The coalition government drafted the Act, then lost the election of July 1998. Nevertheless, the chief cabinet secretary of the new Obuchi government honoured the agreement made with the female parliamentarians. As a result, the *Basic Act for Gender Equality* was enacted in 1999.<sup>6</sup>

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<sup>6</sup> This Act provided the foundation for the government's gender policy: a five-yearly Basic Plan for Gender Equality. The first plan was formulated and approved by parliament in 2000 and a second plan for the period 2005–2010. The preamble to the Act identifies socioeconomic trends such as low birthrates and an ageing population as having motivated the prioritisation of gender equality by the Japanese state (*Basic Act for Gender Equality 1999*). The Act consists of five basic principles regarding governments' roles and responsibilities in establishing a gender equal society at the national and local levels. The five principles are: (1) respect for the human rights of women and men; (2) consideration of social systems and practices; (3) equal participation of men and women in planning and deciding policies of governments and private bodies; (4) compatibility of family life with other activities; (5) international cooperation. [http://www.gender.go.jp/english\\_contents/category/lbp/laws/chapter1.html](http://www.gender.go.jp/english_contents/category/lbp/laws/chapter1.html) (accessed 1

Legislative and financial measures for a gender equal society are identified in broad terms in article 11 of the Act: 'The Government shall take legislative, financial and other measures required to implement the policies related to promotion of formation of a gender-equal society' (Gender Equality Bureau 1999).

Significantly, article 12 requires an annual report to the Diet regarding the formation of a gender equal society. This has taken the form of a yearly White Paper on Gender Equality prepared by the Gender Equality Bureau. While there is no legislative requirement to implement gender-responsive budgeting, the *Basic Act for Gender Equality* provides an institutional framework in Japan that could support gender-responsive budgeting.

### **2.3 Gender impact analysis of policies in Japan**

The Gender Equality Bureau, together with the Council for Gender Equality, monitors the progress of government policies and examines policy impacts from a gender perspective. The Gender Equality Bureau, established in 2001 within the Cabinet Office, also plays an important role in policy and planning coordination with the other ministries. The Council for Gender Equality, also established in 2001, consists of 12 ministers and 12 other members including CEOs of leading Japanese companies, leaders of local governments and academics. The Council, chaired by the Chief Cabinet Secretary, monitors and analyses the impact of government policy on gender equality. The Council's high-level decision-making position and its access to analysis have enabled it to have a strong influence on policy formation for a gender-equal society.

The Council established several specialist committees including the Specialist Committee of Gender Impact Assessment and Evaluation.<sup>7</sup> An early example of their analyses was an analysis of tax, social security and employment, published in April 2002, that recommended that divorced women be entitled to a share of the pension of their former husbands (Osawa 2005: 171). This analysis and the recommendations that the Council for Gender Equality put to the Prime Minister increased the gender equity of the pension system. This recommendation was included in the *National Pension Act* in 2004. In 2007 around 9000 divorced women, namely 3 per cent of total divorced couples in the year, benefited from the new legislation (Social Insurance Agency 2009). However, even after the enactment of the pension reform, a gender gap within divorced couples in pension payments is still prominent (about 90,000 yen per month) (Social Insurance Agency 2009). This is because the pension reform only

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January 2011).

<sup>7</sup> In July 2004 this specialist committee's name was changed into Specialist Committee on Monitoring and Gender Impact Assessment and Evaluation.

acknowledges the contribution of unpaid housework by full-time housewives and not by other women (e.g. those with full-time jobs). In other words, the new pension legislation does not take into account the unpaid work undertaken by all women. Osawa (2007: 168) argues that although the government and a specialist committee for pension reform proposed a new pension system based on individuals rather than couples – a post–male breadwinner model – this was rejected by conservatives. However, despite these limitations the pension reform is a significant outcome of the Japanese policy approach.

In another development the Japanese government has required that policy evaluations be undertaken by all ministries since 2001. However, these evaluations are undertaken for selected programs and do not necessarily include a gender perspective. For this reason, gender impact analysis undertaken by the specialist committee is the most significant way that gender issues are monitored in government policy and budgets. Recent studies undertaken by the Committee on Monitoring and Gender Impact Assessment and Evaluation include lifelong learning and capacity building (2007), support for independent living for the elderly (2008), and impacts of the new economy and society on men and women (2009) (Gender Equality Bureau 2011: 26). In the context of an unstable political environment, a gender backlash by some parliamentarians and media, and the resignation of the chair of the committee, these analyses have not resulted in significant policy and funding changes.

#### **2.4. The government's statement linking finance and gender equality in Japan**

Since 2004 the annual publication of the White Paper on Gender Equality produced by the Gender Equality Bureau has included allocations for programs relevant to promoting gender equality in its appendices. The gender equality programs are based on the twelve policy areas identified in the five-yearly Basic Plan for Gender Equality. In order to produce the appendices, the Bureau calls for each ministry to identify the previous year's expenditure allocated to the twelve priority areas along with the amount of the proposed expenditure in the forthcoming budget (Gender Equality Bureau 2008). The Bureau estimated that in 2009 the total expenditure allocated for these gender equality priority areas was 4 per cent of the general account budget<sup>8</sup>.

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<sup>8</sup> The gender equality budget is sourced from three different types of government accounts: General accounts, Special accounts and Fiscal investment and loans. General accounts and special accounts are submitted to the parliament for approval. In 2009 special accounts reached to 335 trillion yen which was more than general accounts, 88.5 trillion yen (initial budgets). But these two accounts are managed by different ministries; the General accounts are managed by Ministry of the Finance and the Special accounts are managed by each ministry. A major source of funds for the General account budgets comes from national taxes except for certain earmarked taxes, such as special tonnage duty.. Special account



Since 1998, most of the finance earmarked for implementing the Basic Plan for a Gender-equal Society (60 to 80 per cent) have been allocated to support the aged (e.g. infrastructure and financial support). These budgets from the Special Account for the National Pension are managed by the Ministry of Health, Labour and Welfare. In 2000, a parliamentarian inquired why more than 80 per cent of the budgets for a gender-equal society were allocated to financial support for the aged. The Chief Cabinet Secretary answered that this budget was already included in the first Basic Plan for Gender Equality. In 2004 Specialist Committee members also asked the same question of the Gender Equality Bureau. The bureau answered that the number of elderly women was increasing and also women are more likely to provide care for elderly people. In 2006 the bureau repeated the same answer when a question was asked by a women's group (Peking JAC 2006). The bureau assumed that, because women live longer than men, women are more likely to benefit from the financial support programs. However, the average pension per month received by women is much less than men, even when the women have had full-time jobs. Women usually have a break from work due to pregnancy and childcare and these periods out of work affect their pension benefits. These issues point to the need for the budget to be scrutinised more carefully from a gender perspective.

Since 2009 the Gender Equality Bureau has released on its website information on sub-categories of the budget for gender equality priorities which enable an understanding of the detailed budget components. This information is not included in the appendices of the White Paper on Gender Equality but provides data that allows a better understanding of the priorities of the government and the resources committed to reach its gender equality targets. For example, the website reveals that in 2009, within the budget relating to a gender-equal society, a significant allocation is made to the government fund for nursing care pensions<sup>9</sup>. The government allocated about 2 trillion yen, which accounted for 46.1 per cent of the total budget for a gender equal society. In the same year the government allocated funding for several new projects including support for obstetricians in rural areas and subsidies for small and medium-sized companies to improve work hours.<sup>10</sup>

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budget is instituted when the government needs to carry out special projects, to administer and manage specific funds, or to administer revenues and expenditures separately from the General account. Basically each special account budget has its own distinct source of revenue, such as receipts from government enterprises, social insurance contributions, and interest payments from loans outstanding. Also, the revenues of some special accounts may include borrowed funds (Ministry of Finance, Government of Japan: 2009).

<sup>9</sup> The government pay 90 per cent of the nursing care service costs to the service providers (e.g. home based services and community based services) and the rest of the costs is paid by the service recipients.

<sup>10</sup> <http://www.gender.go.jp/yosan/pdf/20yosan-point.pdf> (accessed 21October 2011).

The budget data also points to difficulties faced by the government in reaching the targets set out in its gender equality plans. Table 1 shows the 2007–2010 budgets of two ministries for activities to increase women’s participation in policy decision-making processes to 30 per cent by 2020.

**Table 1. Budget components to increase women’s participation in decision-making processes at the national level, 2007–2010** (Unit: 1000 yen)

	2007	2008	2009	2010
<b>Ministry of Defence</b>				
Establishing childcare facilities within the ministry	0	148,196	76,992	5,602
Establishing women’s staff rooms and change rooms	-	-	-	-
Building women’s residential areas within multi-purpose support ships	-	0	0	0
Training for female staff	596	491	491	487
Provision of maternity uniforms for female defence personnel	645	680	685	1,539
Efforts to prevent sexual harassment	0	1,360	1,360	2,310
<b>National Personnel Agency</b>				
Recruitment and promotion of female government employees	4,130	4,283	2,846	2,447
Programs to promote work and care balance (childcare and elder care)	2,546	1,829	999	348
<b>Sub-total</b> of this budget component	<b>7,917</b>	<b>156,839</b>	<b>83,303</b>	<b>12,733</b>
<b>Total budget for a gender equal society</b>	<b>4,697,169,861</b>	<b>4,570,016,639</b>	<b>4,271,447,536</b>	<b>5,780,728,000</b> (approx USD 74.2million)

Source: Gender Equality Bureau (2007, 2008, 2009, 2010c)

The Ministry of Defence and the National Personnel Authority (equivalent to a civil service employment commission) were the only two ministries that explicitly specified the amount of their budget contributing to the plan’s 30 per cent target. The largest expenditure by the Ministry of Defence was on childcare, as part of work–life balance programs, for three consecutive years. Most of the budget was for establishing onsite childcare centres, with the

first childcare centre in a permanent military base in Tokyo established by the ministry in 2007. By the end of 2010 two further centres had been established at military bases with another two planned. The ministry undertook a survey regarding the establishment of onsite childcare centres on military bases in 2008 and female staff using the centre said that they had an increased motivation towards work.<sup>11</sup> *Sankei* newspaper however reported that the main users of the childcare centre in Tokyo were female nurses categorised as military staff in the Self-Defence Central Hospital located next to the military camp who faced particular problems of non-standard work hours and shift work<sup>12</sup> (*Sankei*, 10 April 2010). Other defence ministry employees located outside the military bases were less likely to use the childcare centres.

Neither the Ministry of Defence nor the National Personnel Agency allocated funding to increase the number of female staff in leadership positions, which is a sub-target for promoting women's participation in national decision-making processes. In the Ministry of Defence only two female staff were in senior positions compared to 559 male staff in 2009 (Gender Equality Bureau 2010b). The number of senior women government employees is targeted to increase to 5 per cent by 2015 in the third basic plan which would require more than doubling its current level across the national level of government.

The disaggregated data on components of the budget for gender equality priorities released on the website of the Gender Equality Bureau provides opportunities to scrutinise policy implementation and monitor budget outcomes from a gender perspective, including progress towards the targets of the Basic Plan for Gender Equality. The budget allocations in Table 1 to improve women in decision making in the public sector is worthy; however such gender targeted allocations are relatively small components of government budgets<sup>13</sup>. Also, at this stage there is no requirement that the ministries set targets and allocate their budgets accordingly. Nevertheless, civil society has been slow to use the data to call governments to account and advocate changes.

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<sup>11</sup> <http://www.mod.go.jp/j/approach/agenda/meeting/seisaku/gijiroku/gijiroku09.pdf> (accessed 21 October 2011).

<sup>12</sup> [http://www.citywave.com/news/2007/04/2007\\_4\\_10.html](http://www.citywave.com/news/2007/04/2007_4_10.html) (accessed 21 October 2011).

<sup>13</sup> Sharp classifies government budgets by three categories; (1) expenditures specifically allocated to gender equality programs; (2) expenditures allocated to promote gender equality in employment within the government; (3) general expenditures which are not included in the above categories 1 and 2. With the categories, Sharp pointed out that the most of government budgets (99 per cent) falls into the category 3 and civil employment services expenditures on equal employment opportunities are a tiny proportion of budgets.

### **3. Gender equality and budgeting in South Korea**

Efforts to introduce a gender perspective into government budgets in Korea began in 1998 when the Korean umbrella NGO, Korean Women's Association United (KWAU) undertook an analysis of women-related budget issues (Kim Y-O 2008). In 2001 the NGO WomenLink undertook a substantial gender analysis of seven local government budgets (Yoon 2002). These early analyses contributed to an active agenda in the Korean National Assembly to adopt gender-responsive budgeting at the national level of government, with the result that a legal basis for gender-responsive budgeting was included in the 2006 *National Finance Act*. This Act makes it mandatory for all ministries to submit a gender budget statement and balance sheet to the National Assembly from 2010 (KWDI 2006). In the four-year lead-up several steps were implemented, including a pilot project starting in 2008 initially involving sixteen government departments that undertook gender budget analyses and prepared gender budget statements (Ma 2008).

#### **3.1. The role of women's NGOs in South Korea**

Women's organisations have played a significant role in putting gender-responsive budgeting on the agenda in Korea and undertaking some early analyses.<sup>14</sup> The first attempt at gender budget analysis was made by the Korean Women's Association United (KWAU). Its focus was the share of government expenditure allocated to gender equality through women-specific programs. It found that the budget for the Ministry of Gender Equality for 2001 was only 0.003 per cent of the total current expenditure. The addition of women-targeted programs in seven other ministries and in the Small and Medium Enterprises Department brought the share to approximately 0.28 per cent (Yoon 2002: 68). The KWAU provided the results of its gender budget analysis to the National Assembly. Several women's organisations argued that the small budget for the Ministry for Gender Equality budget was inadequate to achieve the targets of women-related policies, describing the situation as 'budget wasting' (Yoon 2002: 68).

In 2001 the NGO Women Link undertook a detailed analysis from a gender perspective of

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<sup>14</sup> Women's organisations have grown in influence since the 1980s when social movements flourished with Korea's increased democratisation. These developments, accompanied by women's greater labour force participation, provided opportunities for women to extend their involvement from the traditional realm of the domestic sphere to civil society (Moon 2002). Women's organisations became central in the establishment of national machineries on women within government and the development of government policies relating to gender equality (Ichii and Muramatsu 2008). Gender-responsive budgeting activities have built upon these gender equality institutional arrangements.

several local government budgets including South Korea's capital, Seoul. This gender budget analysis was initiated by one of Women Link's leaders, Dr Yoon Jung Sook, who had undertaken postgraduate research on gender-responsive budgeting in the United Kingdom. While the analysis was restricted to women's policies and women-targeted programs, the findings showed the impact of these policies on women and the implementation of women-targeted budgets (Yoon 2002:73). It highlighted, amongst other things, the very small budget allocations, the lack of data for evaluating the gender impacts of policy and budgets, and the low representation of women in local government (Yoon 2002:74). Women Link's project also demonstrated that some of the Korean government's women-related programs included activities such as sponsoring beauty contests and courses for girls in make-up, skin care and etiquette that actually reinforced stereotypical notions of femininity rather than challenging gender stereotypes and empowering women (Yoon 2002: 75).

The NGO work drew attention and interest from women's groups, civil society organisations, local governments, local assemblies and the Ministry of Gender Equality (Yoon 2002: 65–66). In 2004 one local branch of Women Link in Seoul used a gender budget analysis to assess the mayor's performance on gender policy. It conducted a gender-disaggregated beneficiary assessment of an employment promoting program for older people. The local branch found that the number of older women that participated in the program was less than the number of older men, although the proportion of older women in the population is much greater. However, during the interviews the local government program staff said that they did not have to consider the gender difference in the selection process for participation in the program (Dobong Branch, Women Link 2005). This gender analysis led to the recommendation that local government allocate funds for training to improve gender awareness among its employees (Ichii and Muramatsu 2009: 36).

In South Korea, Women Link and KWAU had the capacity and resources to pioneer gender budget analyses. However, the women's NGOs subsequently shifted their focus from analysis to lobbying the government to introduce gender-responsive budgeting (Ichii and Muramatsu 2008). A key reason for this change was the belief that the implementation of GRB could increase government expenditure on women's programs (Kim Y-O 2008: 21). Towards this end women's groups collaborated with women members of the National Assembly to establish a law requiring GRB. The umbrella organisation KWAU submitted a petition to the National Assembly for the implementation of GRB in 2003 (Kim Y-O 2008).

### **3.2. The role of parliament in South Korea**

In November 2002 the Gender Equality and Family Committee of the Korean National

Assembly proposed a resolution to call for the implementation of GRB. The National Assembly adopted this resolution and various activities were initiated to support legislation on gender budgeting. For example, seminars and workshops on GRB for assembly members were organised along with a signature-gathering campaign to mobilise public support for GRB (Kim K-H 2008a). The Women's Affairs Committee of the Korean National Assembly undertook a study tour to Australia which included GRB presentations by Professor Rhonda Sharp. Among the assembly members supporting GRB was Sim Sang Jeong, a Democratic Labour Party parliamentarian with a background in women's movement activities. As a member of the Gender Equality and Family Committee and the Steering Committee within the National Assembly she was pivotal in developing a resolution for the introduction of GRB (Kim Y-O 2008: 21).

In 2006 Sim Sang Jeong found herself in the powerful position of holding the casting vote in the National Assembly Steering Committee as it considered legislation to reform government finances. With the votes in the committee evenly split, she promised to vote for the reform on condition that the legislation included implementation of gender-responsive budgeting<sup>15</sup> (Ichii and Muramatsu 2009). As a result, the new *Financial Act*, passed in the National Assembly in October 2006, included several articles relating to GRB (articles 16, 26, 34, 57 and 58) (Kim Y-O 2008: 17).

Within the *2006 Financial Act*, articles on gender budgeting relate to budget principles (article 16), preparation of gender budget statements (article 26), attached papers for budget bills (article 34) and gender budget statements (articles 57 and 58). Article 16 noted that the 'government should evaluate the impact of public expenditure on women and men and try to reflect the results in the national budgetary allocation'. The preparation of gender budget statements by government ministries was mentioned in article 26: 'The government should draw up gender budget statements which analyse the impact of the budget on women and men in advance'. Article 34 specifies that this statement should be included in the budget Bill submitted to the National Assembly. In addition the government was required by article 57 to produce a gender balance sheet: 'The government should prepare a report assessing whether the budget benefits women and men equally and remedy gender discrimination'. The Act required gender budget statements to be included as part of the budget statement on expenditure submitted to the National Assembly from 2010 onwards. From 2011 onwards, the Ministry of Strategy and Finance was also required to produce a gender budget statement about the revenue side of the budget.

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<sup>15</sup>Interview with the parliamentarian by Yasuko Muramatsu, 17 December 2008.

Women's NGO's and the National Assembly members had wanted to implement GRB soon after the legislation had been approved by the assembly. However, the four-year period from the approval to the actual implementation of GRB provided opportunities for policy makers to develop methods of GRB. In preparation, the Ministry of Planning and Budget, through its budget guidelines for 2006–2007, ordered that every ministry report on budget allocations that had the aim of fostering gender equality, as well as monitoring the impact of mainstream programs on gender equality (Kim K-H 2008a; Ichii and Muramatsu 2009). As part of the preparation, a GRB research centre was established in a government funded research institute, the Korean Women's Development Institute (KWDI).

In South Korea, because gender budgeting was integrated in the *Financial Act*, it made the financial ministries central to its implementation. Also the Act enabled the integration of GRB into performance budgeting which was introduced from 2000<sup>16</sup>. The South Korean Institute of Public Finance in affiliation with the Ministry of Finance developed manuals for performance indicators based on the Program Assessment Rating Tool (PART) developed in the United States.<sup>17</sup> The Institute of Public Finance working with KWDI, has applied the performance indicators to GRB, enabling integration of a gender perspective into the emerging results-oriented budgetary system. Without the *Financial Act*, such collaborations would not have been established.

### **3.3. Gender impact analysis of policies in South Korea**

Gender impact analysis predates the introduction of GRB and forms part of a package of strategies legally guaranteed and designed to implement gender mainstreaming (Kim K-H 2008a). Gender Impact Assessment (GIA) was introduced in 2004 as part of the *Women's Development Act* (Kim K-H 2008a). The legislation requires that governments, at the national and regional levels, undertake gender impact assessments of the government's women's

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<sup>16</sup> In South Korea performance budgeting was introduced to control public spending and debts. In 2000 the South Korean government undertook a pilot of performance budgeting for selected line ministries formulating strategic goals, performance objectives and its indicators (Kim and Park 2007). These performance related information was disseminated as annual performance plans. In 2005 following the PART, Self-Assessment Budgetary Program (SABP) was introduced to assess major budgetary programs every three years. In the SABP the line ministries assess budget performance according to a checklist including quantitative and qualitative questions developed by budgetary authority. The information of SABP is used by Ministry of Strategy and Finance for subsequent budgetary allocations (Shin 2008). Since 2007, by the enactment of National Financial Management Law, the SABP and In-depth evaluation has been mandatory to all line ministries which also need to submit the results to the National Assembly.

<sup>17</sup> Interview with staff in the Korean Institute of Public Policy by Reina Ichii and Yasuko Muramatsu, 22 December 2007.

policies and report the results to the Ministry of Gender Equality (Ministry of Gender Equality and Family 2006). In the year of its introduction nine ministries undertook a GIA for 10 policies. The number of policies analysed under the GIA legislation increased markedly in 2006 when regional governments were included, with 190 government agencies analysing 314 policies (Kim K-H 2008b: 9).

The GIA is conducted exclusively for policies included in the Women’s Policy Basic Plan which is a five-year master plan to promote gender equality. Each year the Ministry of Gender Equality and Family selects specific policies within the basic plan for the GIA and the policies are announced at a GIA workshop for national and regional governments’ officers (Ichii and Muramatsu 2009). The GIA workshop is organised by the Ministry of Gender Equality and Family several times each year with the aim of building capacity within the different levels of government, allowing the GIA to be undertaken entirely within government rather than being outsourced to gender specialists. To encourage the capacity building, the Ministry of Gender Equality and Family gives awards to government departments and regional governments preparing the most distinguished GIA reports.

The GIA uses nine indicators, shown in Table 2, to evaluate a policy process.

**Table 2. Gender Impact Assessment indicators, 2008**

Policy process	Evaluation indicators
All stages	Production and utilisation of gender-disaggregated data
Phase 1: Drafting and decision making	Identification of gender relevancy of the targeted policies Equal gender participation in the decision-making process of the policy Gender equality in budget allocation
Phase 2: Implementation	Gender equality in delivery methods of the policy services Gender equality in the method of advertising policy services
Phase 3: Evaluation	Gender equality in policy benefits including budget allocation Gender equality in policy impact Improvement plan based on the result of assessments

Source: Kim K-H (2008b: 11)



In relation to budgeting there are two guidelines for evaluation: one is gender equality in budgeting and the other is gender equality in policy benefits including the budget allocation. These indicators in principle facilitate a link between budgeting and gender equality for policies selected for analysis from the Women's Policy Basic Plan. However, in practice linking the GIA to gender-responsive budgeting often falls short of demonstrating how well policy and its funding contribute to women's empowerment and gender equality, and may not provide a basis for effective change. One reason is inadequate GIA analyses. Kim K-H (2008b) reports that GIA has been undertaken at times without using any gender-disaggregated data. In other cases gender-disaggregated data was used, but the analysis was not accurate. For example, a GIA of funding to single parent families concluded that this funding is biased towards single mother families because they received a bigger share of funding than single father families. That is, gender equality was understood as women and men each receiving 50 per cent of the budget allocation. This GIA ignored the fact that the number of single mother families is greater than that of single father families so greater funding to the former may be warranted to meet the goals of the policy (Kim K-H 2008b: 11).

Nevertheless the GIA has resulted in some policy and funding changes. One of the success stories cited is the implementation of the *Act of Public Lavatories* in July 2004. A GIA identified the women had to wait longer than men to use public lavatories. This gender difference in the use of public toilets resulted in legislation that mandated that the number of women's bathrooms must be equal to the number of men's cubicles and urinals (Ministry of Gender Equality and Family 2006). However, this budget allocation could not be sufficient because women are more likely to care for children and those with frail and disabilities, women's bathrooms could be required more than men's. Considering women's caring roles and responsibilities for family and in community, more budget should be allocated towards women. The GIA, nonetheless, implies meaning of gender equality in budget allocation is simply translated into equal budget allocation between men and women. The GIA was restricted to the relatively small expenditures on women's policies and gender-specific programs covered under the Women's Policy Basic Plan. The challenge is to link the GIA and its guidelines with the GRB goal of scrutinising all government policies and their funding for their gender impacts.

#### **3.4. The government's statement linking finance and gender equality in South Korea**

After the passing of the *National Financial Act* in 2006a pilot project on drafting GRB statements was initiated by Ministry of Gender Equality, Ministry of Strategy and Finance, line ministries and the government funded research institutes. The Ministry of Strategy and Finance provided a format for the GRB statements. The format was based on the existing national

financial database, *Dbrain*, which included information on budget allocation, execution, performance evaluation and management. Gender Budget Statements were to be included in the database, potentially enabling gender budgeting to be integrated into the entire budget.

The Gender Budget Statements provide details on two project types. One group covers projects for gender specific expenditure and expenditure for promoting gender equality within the government, which equivalent to Sharp's budget categories one and two. These projects are included in the Women's Policy Basic Plan. The other group consists of general budget which is categories as Sharp's budget category three (Kim K-H 2008a:5).

Table 3 shows the 2009 Gender Budget Statements by project type. Between 2008 and 2009 funding for projects for gender equality that were included in the Women's Policy Basic Plan increased by about 1000 billion won while funding for projects for which a GIA was undertaken did not change. However, both types of allocations are very small compared to the total budget of 273,874 billion won (approximately USD 237 billion). In 2009 only 0.93 per cent of the total budget was allocated to projects for gender equality and 1.29 per cent for projects that had been subjected to GIA. Also the number of projects was low, with both types of project allocations accounting for only 3 per cent of the total number of government projects.

Ma (2008: 135) reports that two thirds of mainstreaming budget analyses could not identify a reason that women were less likely to be benefited from mainstreaming budget programs. The gender budget analysis did not examine the reasons for the gender inequality, the project's lack of policy objectives to achieve gender equality or the lack of alternative plans to achieve gender equality objectives. Also funding for some projects targeted for gender budget analysis did not match the figures in the Gender Budget Statements. For example, the Gender Budget Statement of the Ministry of Justice shows that 1.2 billion won was proposed for a free legal support program for victims of domestic violence and sexual trafficking. This program is one component of 'general' legal support programs, which are funded at 25.8 billion won. However, the Gender Budget Statement reports the aggregated funding of 25.8 billion won for all legal support programs, implying that the entire program contributed to the goals of the Women's Policy Basic Plan (Ma 2008: 137). In this way the funding for gender equality programs and programs subjected to GIA can be overestimated in the Gender Budget Statements. It is important to note that restricting the Gender Budget Statements to the projects included in the Women's Policy Basic Plan plus other projects that have been subject to a GIA ultimately limits the Gender Budget Statements to a small component of total government funding.

**Table 3. 2009 Gender Budget Statements by project type (Unit: million won)**

	2009		2008		Details of 2009 projects	
	Proposed budget	% of total budget	Budget	% of total budget	number	% of total projects
Projects for achieving gender equality	2,533,681	0.93	1,525,462	0.60	166	2.86
Projects included in Gender Impact Analysis	3,531,175	1.29	3,522,281	1.38	45	0.77
Total national budget	273,874,068	100	255,295,082	100	5,813	100

Source: Kim Y-O (2009: 54)

Kim Y-O's (2011) research located in focus group interviews with 36 public servants who had a role in crafting the 2011 Gender Budget Statement highlights how poor technical knowledge of GRB can go hand-in-hand with political resistance. Lack of understanding of the function of Gender Budget Statements and the concept of gender equality underpinning GRB is related to a lack of will on the part of the public servants involved in implementing the GRB system. Kim notes that, while gender mainstreaming 'is intended to sensitize public servants to gender equality issues, especially in relation to their own work...it does not require them to become feminists' (2011: 65). Technical and procedural improvements will not ensure that Korea's fiscal system becomes fully gender-responsive. Consultation and education are crucial in leading budgetary actors to integrate gender equality into their work.

#### **4. Conclusion**

A comparison of Japan's policy pathway and South Korea's legal basis for GRB highlights the achievements and challenges both countries face in mainstreaming gender equality throughout the policy and budgetary processes and outcomes of each country. It also indicates the different mixes and entwining of technical and political activities that form the GRB

initiatives in each country.

The relative strength of Japan's policy pathway is the dynamic political character of its gender impact policy analysis and monitoring. GRB outcomes rely on the advocacy capacity of women's NGOs, the political strength of the national gender machinery and the support of academic members of specialist committees. These alliances working within the framework of the Basic Plan for Gender Equality have led to some important policy and budgetary changes.

South Korea's unique legal foundation for its GRB processes, including the development of a Gender Budget Statement, within the *National Finance Act* is a critical force for mainstreaming a gender perspective into budgets and policies. This was achieved through participatory political engagement. Crucial to obtaining the key support of parliament has been the strategic role played by women parliamentarians and the engagement of women's NGOs pressuring for the introduction of a GRB initiative. Furthermore, NGOs, the national gender machinery and researchers have been central in developing methods of analysing national and lower-level government budgets from a gender perspective. In 2010, at the end of the pilot project, new information and analyses for monitoring gender equality were produced along with some changes to policies and budgetary allocations. In addition, some changes to the mainstream budgetary and planning processes have been introduced.

The institutionalisation of gender-responsive budgeting requires both an analysis of the gender-differentiated impacts of policies and their funding and engaging with both the policy and budgetary decision-making processes to bring about changes in priorities. In Korea's case its budget law increased the monitoring and transparency of the government budget but its capacity to translate this to changes in policy and funding priorities is less developed. For example, although the Gender Budget Statement is part of the government's budget statement, the former has less influence on budget allocations (Kim 2011). In Japan's case the capacity of gender policy advocates and analysts to systematically link with the budget processes and bring about changes in resource allocations is less developed. While the Gender Equality Bureau's annual White Paper on Gender Equality publishes appendices listing each ministry's budget the impacts of the program funding are not analysed. Nor is the work of the national gender machinery well linked to the Ministry of Finance and parliamentarians who have a strong influence on the budget process.

A number of technical and political challenges remain for each country in furthering the institutionalisation of a gender perspective into government policies and their funding. It has been estimated that 2.22 of the total budget was allocated to gender equality projects in 2009 in Korea, as set out in the Gender Budget Statement (see table 3). In Japan the Gender Equality Bureau estimated the total expenditure allocated for gender equality priority areas was 4 per

cent of the general account budget in 2009. While the estimate for Japan is nearly twice that of Korea, the budget proportions for gender equality expenditures for both countries are relatively low. Issues of concern include: the capacity of NGOs to maintain their engagement with GRB; the limited range of policies subject to a gender impact analysis; the emphasis on gender-specific programs rather than large mainstream policies; the lack of comprehensiveness within government statements linking funding to gender equality; the lack of clear channels for changing budgets and policies (including the lack of accountability by the Ministry of Finance); and finally, the limited use of the government's gender budget statements. These GRB challenges differ in nature and scope in each of the two countries because of their different political and institutional contexts.

To address these challenges, continued political pressure will be necessary in both countries, particularly from groups outside government. While women's NGOs played crucial advocacy and research roles in relation to GRB in both countries, their engagement around budgetary issues has remained constrained. Several Japanese women's NGOs lobby government and parliamentarians; however they focus on education, health, labour and social welfare where gender issues have been traditionally more visible. These NGOs have limited experience and capacity in economics and finance, which has made it difficult for them to promote GRB more broadly. In addition, since the late 1990s a strong gender backlash with support from conservative parliamentarians has affected the NGOs' activities. In this environment, the avenues for women's NGOs to expand their engagement in the policy and budgeting processes within the government have been limited. However opportunities that exist for NGOs include making greater use of the information on ministries' budgets in the appendices of the White Paper to advocate policy and budgetary changes.

Compared to the Japanese NGOs, women's NGOs in South Korea have had more influence on policy and budgetary processes. From the 1990s, under the leadership of the KWAU, women's NGOs engaged in a concerted effort to pressure the government to mainstream gender in public policies and introduce new legislation for gender equality. This included having a significant influence on the establishment of women's national machineries and on the development of gender equality policies (e.g. the removal of the family register system and the establishment of quotas for women in public elections) (Ichii and Muramatsu 2008). These women's NGOs have relatively well developed capacities for research and policy development and advocacy. The Ministry of Gender Equality regularly organises consultations with women's NGOs in order to discuss policy development regarding gender equality. The ministry also allocates funding to women's organisations, reflecting its greater relative funding (receiving 3.1 per cent of the total government budget in 2009) than its Japanese counterpart (0.1 per cent in the same year). These political and academic environments have helped increase the number

of women involved in decision making at the national level. They have also expanded networks and partnerships across the institutions (Shin 2008: 119). Nevertheless, since the *Financial Act* was introduced in 2005, the NGOs have struggled to be involved in gender budgeting. Kim (2008: 21) argues that there has not been a space for readily involving women's organisations in the academic and technical discussions about conceptual frameworks and methods of gender budgeting. Also, their focus has shifted from gender budgeting to other gender issues.

The experiences of Japan and South Korea seeking to mainstream a gender perspective into budgets and policies provides insights into the debates about gender mainstreaming theory and practice more generally. In particular, while GRB approaches can be prone to 'technocratisation' and dualities characterising the 'technical-expert' and 'political-participatory' aspects of these exercises, the GRB strategies in Japan and South Korea demonstrate the complex intertwining of these issues. Where the technical and political processes of budgets and policies in the two countries have been significantly interwoven GRB successes have been achieved.

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