

The EU Budget for Gender Equality

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What is gender budgeting?

‘Gender budgeting is 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 the budgetary process** and **restructuring revenues and expenditures in order to promote gender equality.**’ (CoE, 2005).

Why Gender Budgeting?

- Not merely gender mainstreaming of the budget, but a **democratic & participatory** economic governance tool.
- Budgetary process a key part of 'citizenship' (revenue-spending decisions)

Gender budgeting **potentially** helps to:

- Keep governments **accountable** towards high political level commitments to equality targets
- Makes technocratic budgetary process more **participatory** (in & out-house models)
 - Caveat: technical & technocratic budgetary discourse and process

Why gender budgeting for the EU?

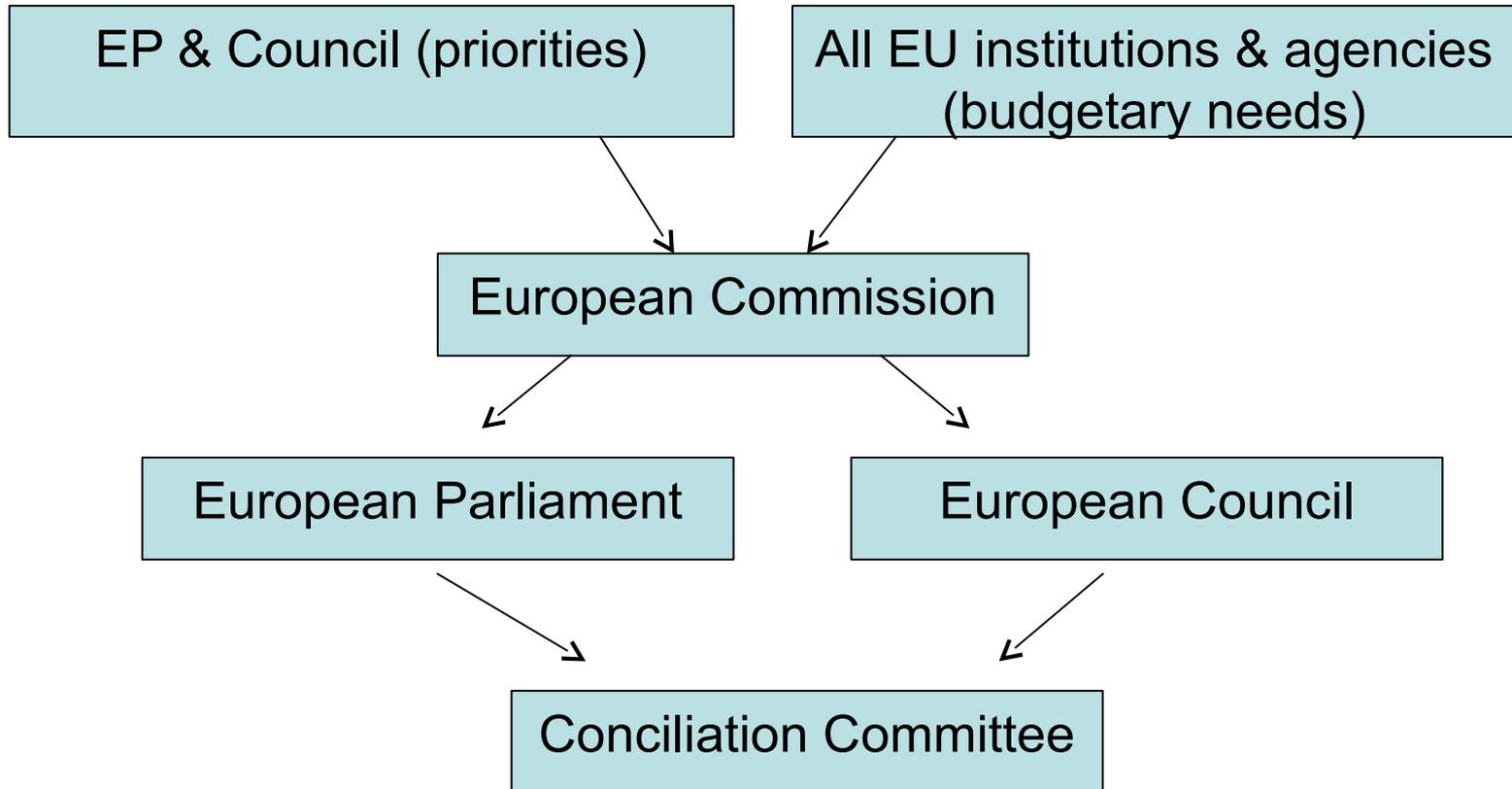
- Relatively small budget €143.5 billion in payment credits (per 507,416,607 citizens) compared with €312.0 billion German spending (per 80,780,000 citizens)
- Absence of a unified macroeconomic policy & welfare system
- Weak revenue system (no direct tax relationship with citizens)

However

- The (contested) power of 'Europeanisation'
- Filling in the gaps where MS commitment is not as strong
- Creating incentives through programs co-financed with the MSs
- A test case for EU's macro level commitment to gender equality (TEU Art.2 & 3 TEU, Art.23 Charter of Fundamental Rights)

The EU budgetary process

- Art.314 TFEU



What happens within the EP?

- Budgetary committee primarily responsible for all EP budgetary prerogatives
- Any committee or 40 MEPs may suggest budgetary amendments – subject to parliamentary vote.
- Non-existent gender discourse in the plenary debates
- FEMM Committee has repeatedly called for gender budgeting in budgetary opinions
- EP Resolution on EU Strategy post-2015 – three key tools for gender equality: gender mainstreaming, gender budgeting & gender impact assessment
- However, this would depend on:
 - Radical use of budgetary powers with specific motions questioning gender equality effects of specific spending decisions
 - Coalition building within the EP to support those motions
 - National commitment is as important in co-financed budget chapters

The paper (pilot study)

- Proposes a **methodology**, based on **capabilities approach**
- **Analyses** six budget titles in the light of the methodology
- **Reveals** lack of budgetary commitment to EU's high level gender equality objectives
- Highlights **missing data and information** which makes assessment of progress difficult

(Cengiz & Beveridge, 'The EU Budget for Gender Equality',
EP FEMM Committee 2015)

The capability approach

- A non-monetary based approach to human wellbeing on the basis of access to 'capabilities' (Sen, 1993).
- Bottom-up, all inclusive, non-hegemonic approach
- What capabilities?
 - Different lists (Nussbaum 2003, Robeyns 2005, Addabo et. al. 2010)
- Ideally a deliberative process, recognizing people's agency
- Works best at micro, local levels – should best be implemented at the MS level.

Table 1: Categories of capabilities used in this report

Category a	Women's and men's engagement with the society	Capabilities to have equal shares in non-market labour and care economy, to have equal voice in family decisions, to engage in social activities, to move etc.
Category b	Women's and men's engagement with the political and social system	Capabilities to have equal access to education, market, employment and politics etc.
Category c	Women's and men's engagement with the environment	Capabilities to have shelter and to live in a safe, clean environment in harmony with the environment and other species etc.
Category d	Women's and men's engagement with their personality	Capabilities to plan one's own time, to have hobbies, to engage in spiritual and religious activities, to choose the education and profession one desires etc.
Category e	Women's and men's engagement with their physicality	Capabilities to feel safe, to live a dignified life, to be free from physical, psychological or emotional violence, to express thoughts, desires and personality in any way, including physical appearance, without the fear of violence or intimidation

Five step methodology

Box 1: Capabilities approach to gender budgeting

Step 1: Identify capabilities key to women's well-being and gender equality

Step 2: Match those capabilities with policies, define gender equality spectrum and impact

Step 3: Analyse policy objectives and resource allocations in the light of conclusions reached at step 2.

Step 4: Identify beneficiaries & participants

Step 5: Reflection & policy change

Budget titles analysed

- European Commission (Section III of the budget)
 - Employment, social affairs and inclusion (Title 04)
 - Home Affairs (Title 18)
 - Justice (Title 33)
 - Development and Cooperation (Title 21)
 - Research and Innovation (Title 08)
 - Education and Culture (Title 15)
- Gender budgeting should include all titles to avoid bias.
- CAP (40% of EU spending) – national hurdles against women's access to land (Shortall, 2015).

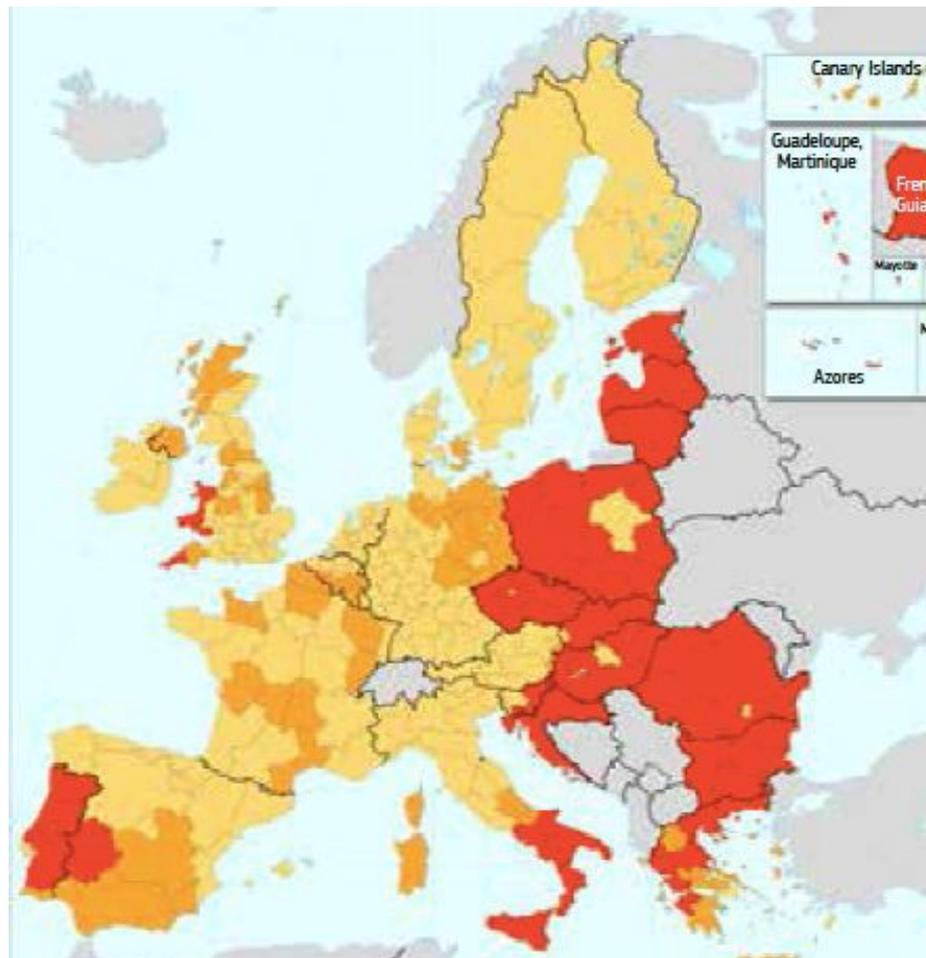
Example – European Social Fund

Table 3: Less developed regions, investment for growth and jobs (article 04 02 60)*

Stated policy objective	Investment for growth and jobs in regions where GDP per capita is less than 75% of the average of the EU 27	
Associated category in MFF	Economic Social and Territorial Cohesion	
Gender equality spectrum	a, b, c, d	
Gender equality impact	Direct, high	
Have gender equality spectrum/impact reflected in policy objectives?	Yes, gender equality a goal in ESF – see commentary above	
Amount (in EUR) attached (in commitments)	2014	5 636 300 000
	2015	6 500 532 038
	MFF**	23 264.1 million
Data on the gender of participants/beneficiaries	Not yet available	

* See Annex II for the map of EU regional policy on the basis of the development status of regions.

**Overall amount attributed to the investment for growth and jobs goal in the less developed regions within the MFF.



Category

- Less developed regions
(GDP/head < 75 % of EU-27 average)
- Transition regions
(GDP/head between ≥ 75 % and < 90 % of EU-27 average)
- More developed regions (GDP/head ≥ 90 % of EU-27 average)

Key Finding 1

High level commitment to gender equality is not followed through into spending

- Home Affairs and Development and Cooperation particularly problematic.
- Employment & Social Affairs, Research & Innovation, Education & Culture are inconsistent.
- Particular problem for cross-cutting issues that fall within the scope of several titles
 - e.g. poverty & social exclusion, immigration and men and women's human rights, cross-border crime and human trafficking

Key Findings 2 & 3

Budget titles are not always sufficiently transparent, in terms of:

- whether gender mainstreaming is implemented
- the specific amount attached to different policy objectives.
- Key example: Rights, Equality and Citizenship (Chapter 33 02) replacing 'Fundamental Rights and Citizenship', Progress and Daphne III programmes.

Target groups are not identified in funding decisions & gender-disaggregated data is often not collected for project evaluation

Recommendations

- Gender equality should be recognised as policy objective in all budget titles
- Gender mainstreaming should be embedded as policy implementation method in all titles
- Specific amounts allocated to separate actions need to be specified in the budget to increase transparency
- Gender specific indicators and data should be systematically developed and published

Who should do what?

Gender budgeting implies:

- EU institutions, bodies and agencies should use gender equality indicators and target groups when they ask for funding.
- The Commission should make sure that these guidelines are followed and the draft budget is sufficiently transparent.
- EP should use its role in the budget adoption & discharge processes to ensure others are accountable for gender equality.