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# Gender Budgeting

Focus on European Structural  
and Investment Funds

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# Gender Budgeting: summing up

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‘Gender Budgeting means a gender based assessment of budgets, incorporating the gender perspective at all levels of the budgetary process and restructuring revenues and expenditures in order to promote gender equality’.

In short, Gender Budgeting is a strategy and a process with the long-term goal to achieve:



Equity

Efficiency

Trasparenza

# What is not?

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Gender Budgeting is not preparing separate budgets for women, or budgets which spend the same amount on women and men, but budgets which recognise the different situation and needs of women and men and aim to promote gender equality by assessing the gender equality impacts of allocations.

# How to do it?

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## **Phase 3**

Working sistematically to embed gender equality within the budgetary process

## **Phase 1**

Analysis of the budget from a gender perspective to assess the different impacts of envisaged measures on women and men.

## **Phase 2**

Rectructuring allocations of Resources to achieve Gender equality outcomes.

# Gender Budgeting – success factors

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Some of the key elements and enabling factors for successful gender budgeting include:

- Political will and political leadership,
- High-level commitment of public administration,
- Improved technical capacity of civil servants,
- Civil society engagement,
- Availability of sex disaggregated data.

# Gender Budgeting – methodologies

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Several methodologies have been developed to implement gender budgeting, one of the most well-known classification was presented by Elson in 1997:

- Gender-aware policy appraisal
- Gender-disaggregated beneficiary assessments
- Gender-disaggregated public expenditure incidence analysis
- Gender-disaggregated tax incidence analysis
- Gender-disaggregated analysis of the impact of the budget on time use
- Gender-aware medium term economic policy framework
- Gender-aware budget statement

# A focused short-term approach

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- Previous presentation showed that:
  - several research activities have been undertaken in view of implementing gender budgeting at European Union level and they can be already used to take action;
  - the gender equality perspective into the European Union policy making process is still not achieved.
- A reform of the EU budgetary process with the view to include Gender Budgeting systematically is the preferred option so action should be taken to achieve this objective but be a long process.
- In the meanwhile it is possible to focus on specific areas of the EU Budget and adopt Gender Budgeting elements to improve the EU policy making achievements (outputs and results) in terms of gender equality. This is a good time as the forthcoming Multiannual Financial Budget 2021-2027 is now under discussion.

# What to focus on: ESI Funds

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According to the European Commission (February 2018\*) the EU Multiannual Financial Framework 2014-2020 allows the European Union to invest around €1, 08 trillion over the same period.

A large share of this amount are EU payments made to the Member States and Interreg programmes, and achievements (targets, decided and implemented) under the European Structural and Investment Funds (ESIF).

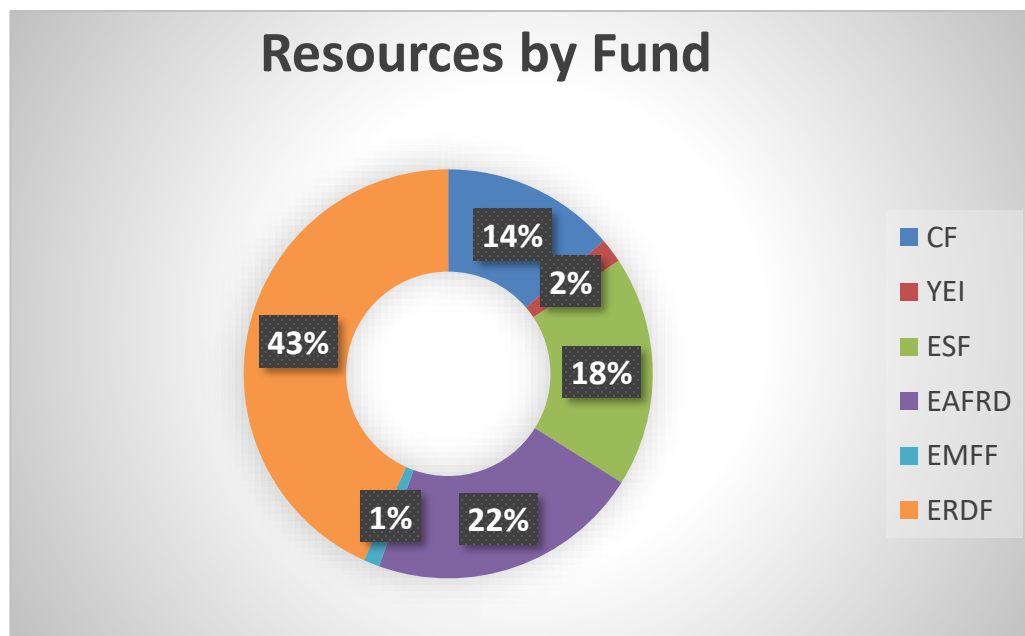
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# Distribution of resources by ESI Funds

The European Structural and Investment Funds (ESI Funds) are:

- the European regional development fund (ERDF),
- the European Social Fund (ESF),
- the Cohesion Fund (CF),
- the European Agricultural Fund for Rural Development (EAFRD),
- the European Maritime and Fisheries Fund (EMFF).



# Sources of suggestions I

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FGB suggestions draw from our extensive experience in:

- Evaluation of ESF and ERDF from a gender equality perspective (current and previous programming period) including detailed country level analysis.
- Several evaluations of ERDF and ESF.
- Assessment of the Multiannual Financial Framework 2014-2020 from a gender equality perspective for the European Parliament.

[http://www.europarl.europa.eu/RegData/etudes/note/join/2012/462426/IPOL-FEMM\\_NT\(2012\)462426\\_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/note/join/2012/462426/IPOL-FEMM_NT(2012)462426_EN.pdf)

# Sources of suggestions 2

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In addition this presentation benefitted from a Gender Budgeting exercise conducted for EIGE in 2017.

Results have been produced under the contract EIGE/2017/OPER/03 with EIGE and the opinions expressed are only of FGB researcher and do not represent EIGE's official position.

## Disclaimer

*The study is financed by and prepared for the use of the European Institute for Gender Equality.*

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# What can be held as it is?

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The regulatory framework for the ESI Funds 2014-2020 provides the main **legal basis** for supporting the gender equality principle. That should be kept.

*According to art. 7 of the Common Provisions Regulations (CPR), Member States (MS) and the European Commission “shall ensure that equality between men and women and the integration of gender perspective are taken into account and promoted throughout the preparation and implementation of programmes, including in relation to monitoring, reporting and evaluation”.*

...nothing to add to the legal basis

# What to improve?

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Possible improvements regard all phases of ESI Funds implementation.

- The Partnership Agreement (PA) and the Operational Programmes (OP) (*i.e. programming, setting objectives and targets to analyse performance*).
- Management and implementation (*i.e. translating strategic and operational programming in concrete projects and interventions, defining criteria for selecting these, and setting up monitoring committees*).
- Monitoring and reporting (*i.e. data collection at the level of the interventions and aggregation for the preparation of Annual implementation reports of the OPs and Progress reports on the Partnership Agreement*), the updated system of monitoring with several gender sensitive indicators.
- Evaluation (*i.e. at every step of the policy making process ex ante, ex post and on-going and at different governance level: Managing Authority, Member State and European Commission*).

# What to improve: example I

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- Point 5.3 of the Common Strategic Framework requires a gender analysis 'where appropriate'.
- This provision is subject to the 'duly justified assessment of the Member State of the relevance of horizontal principles to the content and objectives of the programme'.
- As set out in Article 96 (7) CPR, this section is not subject to the Commission decision approving the Operational Programme and remains under the responsibility of the Member State.

# What to improve: example 2

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- ✓ The ERDF monitoring system does not foresee the collection of gender relevant indicators and sex-disaggregated data.
- ✓ Justification: *'it does not address individuals but organisations and entities and, as such, it can only have an indirect impact on gender equality'*.
- ✓ Relevant indicators to monitor gender equality in the area are easy to identify: the number of female enterprises benefiting from funding, number of female researchers hired through R&D projects, and the existence of gender equality plans in organisations benefiting from funds.

# What to improve: example 3

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The regulatory framework does not provide for clear and binding provisions for Member States and Managing Authorities with regard to:

- Defining general and specific gender equality objectives/targets against which Operational Programmes should be assessed
- Making minimum financial allocations for gender-relevant interventions (both specific and mainstreamed actions).



# ESI Funds and gender mainstreaming

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Potentially ESI Funds might successfully deal with gender equality challenges. However Thematic Objectives and the vast majority of Investment Priorities or measures in the current programming period do not account for gender equality. To avoid that ESI Funds reproduce existing gender inequalities:

- Specific attention should be paid to the issue.
- Actions should be taken to promote access of women to measures.
- Mainstreaming actions should be implemented in a uniform and effective manner.

More in details in the following slides.

# Better implementation in ESI Funds I

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- A commitment to gender equality that adopts the **dual approach** to gender equality throughout all ESI funds in Partnership Agreements.
- Require **Socio-Economic Analysis** and clear **targets** also adopting national gender equality plans for ESI Funds.
- Include both **'soft' and 'binding' provisions** for gender equality. Support the implementation of provisions through incentives or dedicated resources.

# Better implementation in ESI Funds 2

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- A gender equality **infrastructure** should be created at MS level, covering all ESI Funds at Managing Authority level for ensuring an effective implementation of gender mainstreaming.  
Technical assistance should be ring-fenced for this institutional infrastructure.
- Strengthening **partnership** by engaging equality bodies and civil society as active partners in the planning, monitoring and evaluation activities of ESI Funds, by concretely support and resource them (already foreseen for ESF).

# Better implementation in ESI Funds 3

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- Strengthening **gender-disaggregation** in **data** also covering the gender dimensions of beneficiary organisations/institutions (especially for the ERDF)
- Introduction of **gender impact assessment** tools for European policy officers involved in negotiations with Member States.

# Introduce Gender Budgeting elements

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- Ensure that a share of ESI Funds financial allocations are devoted to gender relevant interventions and put in place an **earmarking mechanisms** and respective guidance for Member States (*as for resources for climate change objectives*).
- Require Managing Authorities to develop **gender sensitive financial indicators** to measure planned and actual expenditure for promoting gender equality (*including tracking of gender equality requirements in project selection criteria*).
- Require that **monitoring and evaluation** of the gender equality principle is concretely reported and discussed (*Annual review meetings, Progress and Annual implementation reports and Monitoring Committees*) and that relevant remedial actions are effectively implemented and followed-up.

# In particular: monitoring and evaluation

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- Adapt national monitoring and evaluation framework to gender equality objectives.
- Integrate the gender dimension horizontally into all planned evaluations and invest in capacity building to achieve this.

# Summary

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- Gender Budgeting is a valuable tool for gender mainstreaming
- It consists of several methodologies aimed at assessing and restructuring budgets to improve gender equality in the society
- Several activities have been already undertaken in this direction at European Union level and the results can be already used to implement concretely elements of gender budgeting in the European Union Budget.
- In this presentation some suggestions on actions that can be undertaken for the next programming period in relation to ESI Funds were presented.

For more information please contact us.

Thank you.

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