

# FOR A GENDER-RESPONSIVE EU BUDGET

March 2018

*This paper makes the case for a gender-responsive EU planning and budgeting in the context of the preparation of the next EU Multiannual Financial Framework (MFF) post-2020.*

## FROM MAINSTREAMING TO BUDGETING

Gender mainstreaming is a strategy towards realising gender equality. It refers to the integration of a gender perspective into every stage of a public intervention: preparation, design, implementation, monitoring and evaluation of policies, regulatory measures and spending programmes<sup>1</sup>. Gender budgeting is one of the key strategies available to mainstream gender into public interventions, with a particular attention to budget definition, analysis, implementation and review.

## UNDERSTANDING GENDER BUDGETING

The European Institute for Gender Equality defines gender budgeting as a way to achieve gender equality by “*focusing on how public resources are collected and spent*”<sup>2</sup>. The Council of Europe describes further the process as “*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*”<sup>3</sup>.

Gender-responsive budgeting attempts to break down, or disaggregate, the mainstream budget according to its impact on women, girls, men and boys, and

different groups of women/girls and men/boys. This analysis then leads to the adjustment of projected expenditures to correct the identified imbalances. Gender responsive budgeting facilitates the attainment of modern standards of public financial management such as performance orientation, transparency, accountability, and participation<sup>4</sup>. Finally, the inclusion of a gender perspective is key to enable better and more evidence-based decision-making, which in turn contributes to ensuring an effective use of public funds.

Gender budgeting is a process involving steps throughout the budget cycle<sup>5</sup>, including:

- An analysis of budgets from a gender perspective,
- Development of gender equality objectives for each budget title,
- Restructuring the budget according to the new objectives,
- Implementation of programmes,
- Monitoring, evaluation and feedback into the next cycle.

<sup>1</sup> European Institute for Gender Equality (EIGE)

<sup>2</sup> EIGE, Gender budgeting, 2017, p.4 <http://eige.europa.eu/gender-mainstreaming/methods-tools/gender-budgeting>

<sup>3</sup> Council of Europe (2005), Final report of the Group of Specialists on Gender Budgeting (EG-S-GB), EG-S-GB (2004) RAP FIN; Equality Division, Directorate-General of Human Rights, Council of Europe, Strasbourg, p. 10, available at [http://www.mpsv.cz/files/clanky/12462/GenderBudgeting-report2005\\_En.pdf](http://www.mpsv.cz/files/clanky/12462/GenderBudgeting-report2005_En.pdf)

<sup>4</sup> EIGE (2017) ‘Gender budgeting’

<sup>5</sup> Care, DSW, EWL, EPF, International Rescue Committee, IPPF European Network, ONE, Plan International, Save the Children and World Vision: ‘EU gender budgeting: investing for impact’, October 2016

## EU COMMITMENT TO, AND IMPLEMENTATION OF, GENDER BUDGETING: WHERE ARE WE?

Under the current Multiannual Financial Framework, the three EU institutions agreed that: *“the annual budgetary procedures applied for the MFF 2014-2020 will integrate, as appropriate, gender-responsive elements”*<sup>6</sup>. The European Council further emphasised the need for concrete *“gender-responsive policies, programmes and regulations, including budgeting that is gender sensitive and addresses inequalities”*<sup>7</sup>. Beyond specific commitments to gender budgeting, if the EU wants to turn its commitment to gender equality<sup>8</sup> into concrete action, gender-responsive budgeting is a tool it cannot afford not to use.

However, both in internal and external action, the European Parliament assessed that *“overall funding resources for gender equality and women’s empowerment actions remain inadequate”*<sup>9</sup> and that *“tools for gender mainstreaming, such as gender indicators, gender impact assessment and gender budgeting, are very rarely used in policy design and implementation”*<sup>10</sup>.

## RECOMMENDATIONS FOR A GENDER-RESPONSIVE EU BUDGET

The EU institutions must **commit to adopting a gender-responsive approach** when defining the EU budget and assessing its impact on women and girls and on changing gender-biased norms. They must commit to implementing a gender budgeting analysis and adjust structures, mechanisms and tools to fully incorporate this approach. Appropriate and sufficient resources should be allocated to ensure the institutions live up to this commitment. Key steps include:



## Building capacity within the European Commission

Dedicated and expert human resources are critical to conduct gender budgeting and build further capacity at all levels within the institution.

The Commission needs to:

- hire gender budgeting experts to work in an inter-service gender budgeting working group within the European Commission to contribute to the preparatory work and implementation of the new MFF,
- build internal capacity on gender budgeting (beyond general capacity building and sensitisation on gender mainstreaming) with a strong coordinating structure within DG Budget and a gender budgeting focal point in every DG,
- facilitate knowledge exchange with and among Member States on this issue, in particular those with experiences with gender budgeting at national level



## Adopting a clear set of tools and indicators to monitor gender objectives in the new MFF and ensuring the collection of gender disaggregated data in all programmes

The absence of public data on the implementation of gender objectives in the current MFF makes it impossible to track progress. A set of indicators needs to be adopted to allow collection and analysis of gender-disaggregated data with a focus on issues which particularly impact women and girls. For external EU programmes, the annual publication of gender equality DAC markers for the EU is not enough to illustrate their concrete impact on changing gender norms and on the lives of women and girls.

<sup>6</sup> Joint declaration of the European Parliament, the Council and the Commission attached to the 2014-2020 MFF on gender mainstreaming.

<sup>7</sup> Council Conclusions on gender and development, 26 May 2015, 9242/15

<sup>8</sup> The Lisbon Treaty places equality between women and men among the core values of the EU (Art 1a). The EU has issued many documents which support this commitment, notably the Gender Action Plan 2016-2020 (GAPII), the EU Strategic Engagement for Gender Equality 2016-2019 and the Action Plan on Human Rights and Democracy (2015-2019)

<sup>9</sup> European Parliament Research Service, EU Gender Action Plan 2016-2020 at year one – European Implementation Assessment, October 2017, p.71 [http://www.europarl.europa.eu/thinktank/en/document.html?reference=EPRS\\_STU%282017%29603256](http://www.europarl.europa.eu/thinktank/en/document.html?reference=EPRS_STU%282017%29603256)

<sup>10</sup> European Parliament resolution of 14 March 2017 on EU funds for gender equality (2016/2144(INI)), §9

Furthermore, the progress of the EU towards its defined objective of 85% of its ODA to be allocated to programmes with gender as principal or significant objective<sup>11</sup> remains slow, with only 29% of EU ODA actually allocated to such programmes in 2014-2015<sup>12</sup> and no corrective mechanisms identified.

structured: it needs to be systematic, analytical and documented.



### Establishing clear mechanisms and feedback loops in the MFF cycle to maximise its gender responsiveness

Constant reassessment mechanisms should be introduced in the budget process. It is key that evidence is used to feedback into EU programming and adjust it accordingly throughout the budget cycle.



### Conducting a gender impact assessment of the next MFF before its adoption

The impact of programmes under the next MFF need to be assessed ex-ante, as part of the ongoing budget control, specifically on their impact on gender inequalities to gauge whether they reduce, maintain or increase inequality. This assessment needs to be

With the help of gender indicators and gender impact assessments, the EU could carry out a gender-responsive analysis of the current MFF and adjust expenditures in the next MFF. Together with increased and targeted funds to improve the lives of women and girls, a better-structured EU budget could help to address gender equality.



<sup>11</sup> GAPII 2016-2020

<sup>12</sup> Calculated on the basis of data provided by: Aid in Support of Gender Equality and Women's Empowerment, Donor Charts, Statistics based on DAC Members' reporting on the Gender Equality Policy Marker, 2014-2015, March 2017, <http://www.oecd.org/dac/gender-development/Aid-to-Gender-Equality-Donor-Charts-2017.pdf>