

# 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?

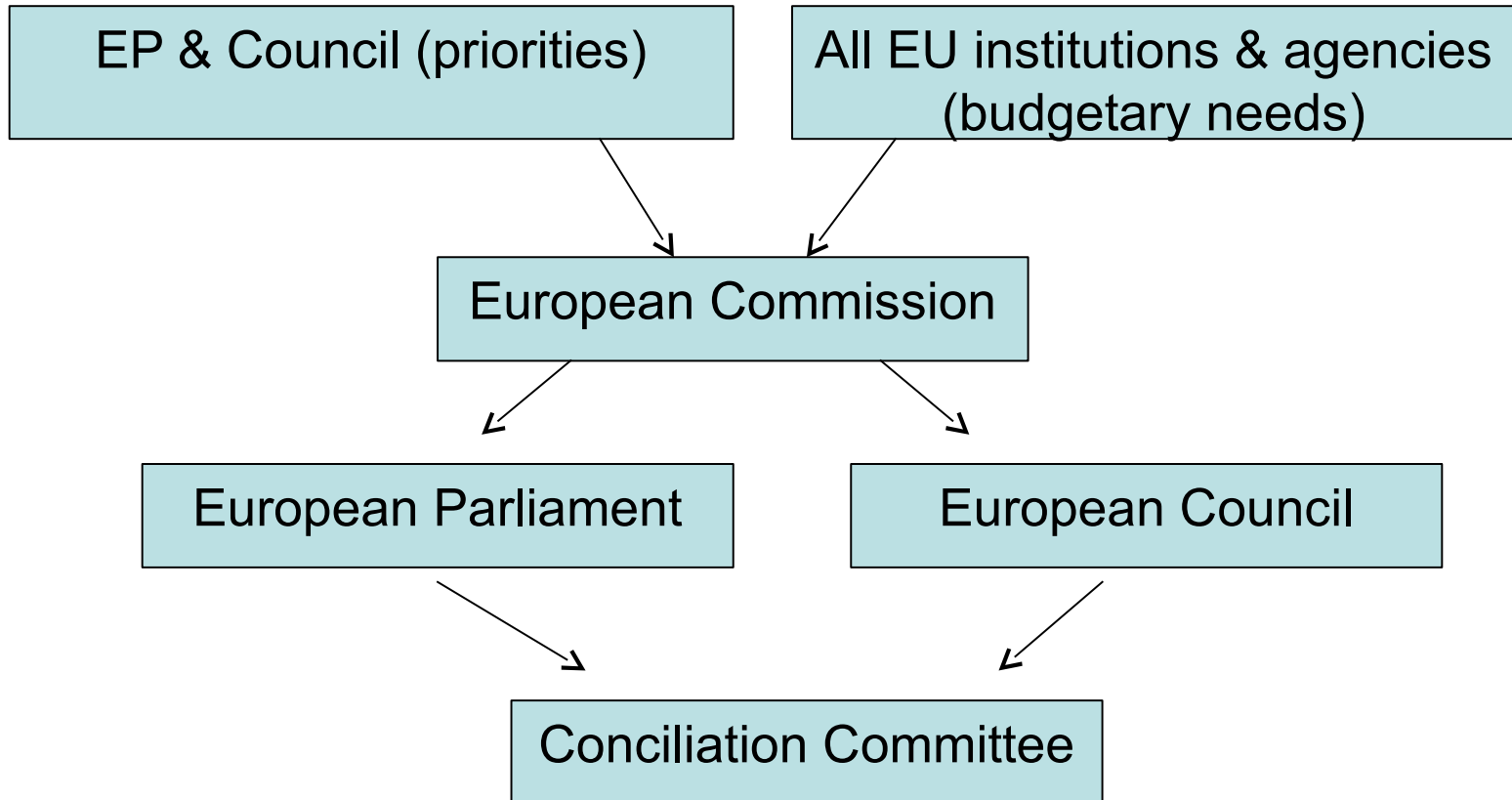
- Relatively small budget €143.5 billion in payment credits (per 507,416,607 citizens) compared with €312.0 billion German spending (per 80,780,000 citizens)
- Absence of a unified macroeconomic policy & welfare system
- Weak revenue system (no direct tax relationship with citizens)

## 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**

<b>Category a</b>	<b>Women's and men's engagement with the society</b>	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.
<b>Category b</b>	<b>Women's and men's engagement with the political and social system</b>	Capabilities to have equal access to education, market, employment and politics etc.
<b>Category c</b>	<b>Women's and men's engagement with the environment</b>	Capabilities to have shelter and to live in a safe, clean environment in harmony with the environment and other species etc.
<b>Category d</b>	<b>Women's and men's engagement with their personality</b>	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.
<b>Category e</b>	<b>Women's and men's engagement with their physicality</b>	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).

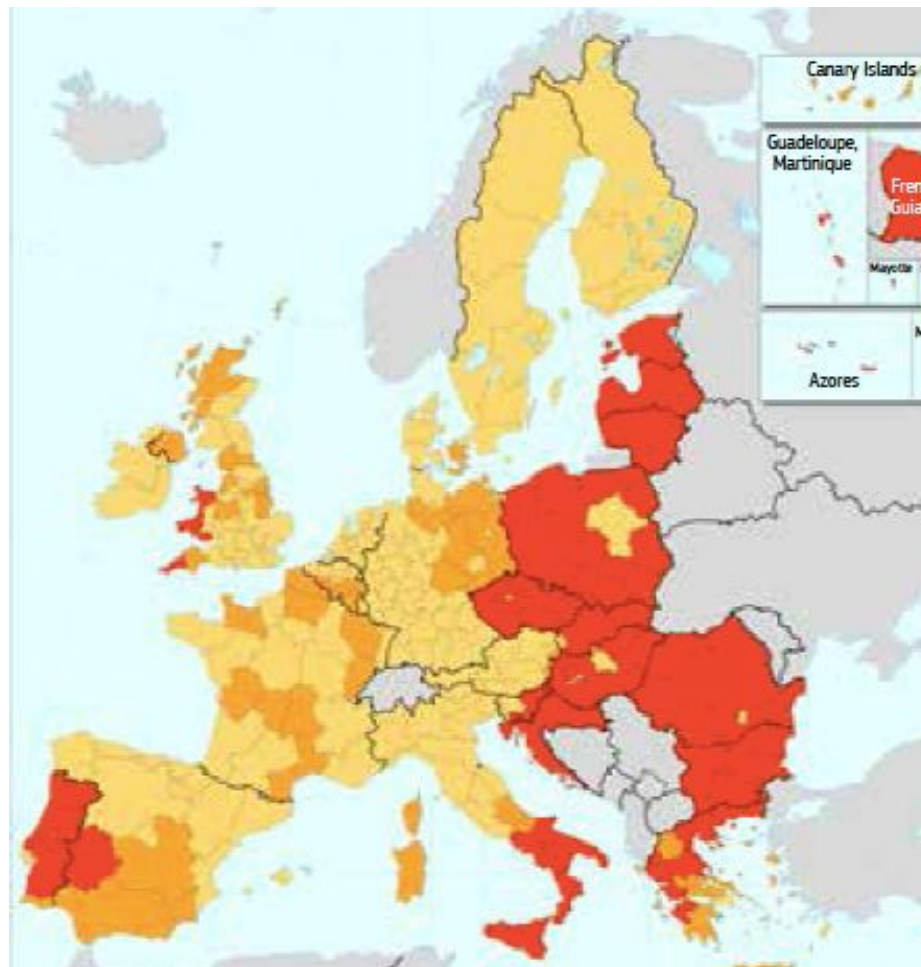
# Example – European Social Fund

**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  $\geq 75$  % and  $< 90$  % of EU-27 average)
- More developed regions (GDP/head  $\geq 90$  % 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.