



# EIGE's work on Gender Budgeting

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# State of Play on Gender Budgeting

- Large majority of Member States of the EU embarked on some kind of GRB work at a certain point in time
- Only a limited number of countries have some robust and systematic GRB work inside public institutions is ongoing
- Longstanding work from civil society and academics

## **Level of government resp. administration carrying out GB work**

- At all levels of government, central government, regional and local level, there is a broad diversity of GB work
- Large variety of GB experience

## **Location of coordination within public authorities**

- Central role of Ministries / Departments of Finance seems to involve a particular potential for longstanding GB work
- Models of coordination body with cross-cutting institutional cooperation is helpful for GB work

# Analysis of Gender Budget Experience (2)

- **Involvement of different institutions and actors in GB activities**
- **Normative basis**
  - Some MS have legal obligation to implement GB: BE, DK, EE, ES, FR, IT, AT, FI, NL
  - Others based on government decision or other national and international commitment
- **Time frame and degree of institutionalization**
- **Scope of Gender Budgeting implementation**

## Gender Budgeting approaches and methods used

- Wellbeing Gender Budgeting (WBGB)
- Mainstreaming Gender Perspectives into the whole process of Public Finance Management
- Integrating Gender Perspectives into performance-based resp. program-based budgeting
- Categorization of budget programs & gender analysis
- Linking Gender Budgeting and Participatory Budgeting
- Tracking financial allocations to promote women's rights and gender equality
- Application of standard GB tools
- Combining gender budgeting with impact assessments

# Clustering of Gender Budgeting work in Member States

## Degree of experience in implementing Gender Budgeting

- a. no experience of GB work so far
- b. some experience, involving one-off GB activities or projects, e.g. sensitization measures, manuals, trainings, isolated pilot projects.
- c. experience in GB work that is more than a series of one-off activities or projects available or discontinued systematic GB work
- d. with ongoing GB activities which aim at systematic integration of GB in budgetary processes.

## Type of Budget System

- a. a line item budgeting system in place
- b. any form of results-oriented budgeting system in place
- c. an ongoing budget reform aimed at introducing a new budget system.

# EU Budgetary Processes and Potential for Gender Budgeting

- Several entry points for integrating GB tools and methodologies in existing processes and documents.
- Focus on performance and results opens opportunities for GB, but requires GE objectives and indicators.
- Legal bases of funding programmes important for GB in annual budgetary process and ESIF.
- Comprehensive recommendations for gender budgeting in the MFF, annual budgetary process, ESIF and European Semester exist, but have been only partially implemented.

# European Structural and Investment Funds (ESIF) (1)

## State of play

- At EU-level GE better integrated in programming documents.
- EC taken some steps to ensure MS implement gender equality requirements.
- Funding for the promotion of gender equality has increased since last period (from € 3.46 billion to € 5.85 billion).
- Still no systematic method for implementing gender mainstreaming at national and regional level.
- Little work explicitly on gender budgeting



# European Structural and Investment Funds (ESIF) (2)

## Entry points

- Focus on results (fund-specific objectives and indicators, performance frameworks of OPs) an opportunity, but requires GE objectives and gender sensitive/specific indicators.
- Use of the increased role of EC in national planning to ensure MS take gender equality requirements into account.
- Strengthened reporting process: obligation to report on GE in 2017 and 2019.

## Challenges

- Narrow, quantitative focus on monitoring, GE goals/indicators not sufficient.
- Requirement for gender-disaggregated data only in ESF.
- Macroeconomic conditionality may sideline funding allocation for gender equality.

# Preliminary research results

- Macroeconomics of Gender Budgeting, and budgeting processes in the EU and EU member States (MFF, ESI Funds and the European Semester) from a gender perspective - report
- Gender budgeting in the European Structural and Investment Funds (ESF and ERDF): the needed change towards gender equality - recommendations

## Gender budgeting: closing the gaps between gender equality commitments and resources in the EU

**Result 1** Tailored methods, approaches and recommendations for more effective gender mainstreaming and inclusion of gender budgeting in the ESIF for the post-2020 programming period developed.

**Result 2** Model for integrated initiatives in the field of gender equality and work-life balance developed.

**Result 3** Gender budgeting methods and tools developed to improve technical capacity and raise awareness of gender budgeting.

**Result 4** Increased awareness and uptake of gender budgeting as an effective gender mainstreaming tool towards the advancement of gender equality.

**1.1** Report reflecting a gender analysis of progress reports, annual implementation (AIRs) and annual summary reports from 2017, and providing recommendations for gender mainstreaming and gender budgeting in the post-2020 period.

**1.2** Report presenting a system to track spending related to gender equality throughout all ES Funds funding programmes.

**2.1** Model / case study on integrated approaches and interventions between the ESI Funds (ESF and ERDF) in the field of WLB.

**3.1** Practical step-by-step module (tools and approaches) to implement gender budgeting as a tool for gender mainstreaming.

**4.1** Factsheets presenting Results 1 -3.

- Inception meeting (NIRAS SWEDEN in consortium with OIR GmbH) – week 1
- Experts meeting to validate Result 1 – week 12
- Experts meeting to validate Result 2 – week 24
- Experts meeting to validate Result 3 – week 34
- Factsheets (Result 4) – week 41
- End of the project (May 2019)



**Thank you very  
much**

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