

## EU FUNDING FOR GENDER EQUALITY: THE NEED FOR A GENDER RESPONSIVE BUDGET

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### ABSTRACT

*The paper discusses how gender mainstreaming is applied in the EU funding allocations for 2014-2020, with focus on the EU Multiannual Financial Framework (MFF) and the main EU funding programmes. The analysis shows that notwithstanding EU commitment to gender mainstreaming, gender budgeting is not systematically applied in the EU multiannual budget and in the analysed programmes. Gender equality is declared as a horizontal objective in almost all EU programmes, but often not translated into concrete goals, actions and earmarked funding, with the EU budget showing a weak and piecemeal commitment to gender equality. Some important tools, like Gender Impact Assessment and Gender Budgeting, are still rarely adopted by the EU or national institutions. In order to be effective, the EU's political and legal commitment to gender mainstreaming has to be supported with earmarked funding and allocations in the EU budgetary and spending decisions.*

*Keywords:* Gender mainstreaming, EU budget, EU financial allocations, EU programmes' regulations.

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### 1. THE EVOLUTION OF THE EU APPROACH TO GENDER EQUALITY

Gender equality is a fundamental right in Europe<sup>1</sup> and it is increasingly recognised as a key factor for achieving the EU objectives of growth, employment and social inclusion.

The EU commitment in promoting gender equality has evolved over the years. From the initial approach focusing on equal treatment in employment, since the mid-1990s the application of the gender equality principle has been extended to all domains of EU intervention with the adoption of a dual-approach strategy encom-

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<sup>1</sup> The Treaty of Amsterdam (1997) placed gender equality among the principles of the Treaty and introduced for the first time the concept of gender mainstreaming. Art. 23 of the EU Charter of Fundamental Rights (2000) states that equality between women and men must be ensured in all areas. With the Lisbon Treaty (2009), equality between women and men has been upgraded to the status of "fundamental value" (Art.2 TEU) and objective (Art.3 TEU) of the EU. Gender mainstreaming is rooted in the Article 8 of the TFEU.

passing both targeted policies for gender equality and a gender mainstreaming approach.

Gender mainstreaming is based on the recognition that women and men do not have the same resources, needs and preferences and that many policies are not gender neutral, but treat men's experience as the norm (Rees, 1998). The gender mainstreaming approach involves the adoption of a gender perspective in all policies, programmes, practices and decision making processes, taking into account their possible different effects on men and women<sup>2</sup>. To be effective gender mainstreaming requires the adoption of a gender perspective in all the stages of the policy cycle, from needs' assessment and policy design, to implementation, monitoring and evaluation.

Since 2010, the European Commission promoted encompassing gender equality strategies which provided a valuable framework for gender mainstreaming and the implementation of gender equality policies in the European Commission and in Member States (IRS, 2015). The Commission's "Strategy for Equality between women and men 2010-2015"<sup>3</sup> and the following, less binding, "Strategic Engagement for Gender Equality 2016-2019"<sup>4</sup> extended emphasis towards the equality of men and women outside the field of employment, addressing gender equality in decision making, and EU external affairs. This strategy also supported an extension of the types of actions and measures implemented, with increasing attention to awareness-raising measures, data-gathering, monitoring and evaluation tools. The involvement of all the European Commission Directorates General, even if to different degrees, in the programming and implementation of gender mainstreaming in almost all the EU policy domains, has been another significant achievement, thanks to the creation of an interdepartmental coordination mechanisms (the Inter-service group on gender equality) and a greater gender balance in management positions in Commission's departments and services<sup>5</sup>.

Even if greatly improved in recent years, gender mainstreaming is however still

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<sup>2</sup> An example of this new approach is the 2004 Equal Treatment in Goods and Services Directive (2004/113/EC) on implementing the principle of equal treatment between men and women in the access to goods and services, for the first time extending gender equality and anti-discrimination in EU law beyond the employment and social policy domain.

<sup>3</sup> European Commission (2011), Strategy for equality between women and men 2010-2015, European Union. <https://op.europa.eu/en/publication-detail/-/publication/c58de824-e42a-48ce-8d36-a16f30ef701b/language-en>.

<sup>4</sup> European Commission (2015), Strategic Engagement for Gender Equality 2016-2019, European Union. [https://ec.europa.eu/info/sites/info/files/strategic\\_engagement\\_en.pdf](https://ec.europa.eu/info/sites/info/files/strategic_engagement_en.pdf). It is important to underline that this is a working document, not an officially approved Strategy.

<sup>5</sup> The Juncker Commission defined an internal target of 40% women in senior and middle management positions by the end of 2019. According to the latest data available (October 2019) these targets have been surpassed: female managers at all levels stand at 41% (from 30% at the beginning of the Juncker mandate in 2014). Among the middle managers or Heads of Unit, women are 42% up from 31%, while among Directors General they increased to 38% from only 14% in 2014.

lacking in implementation. As argued in this paper, gender equality is declared as a horizontal objective in almost all EU programmes, but often not translated into concrete goals, actions and earmarked funding, with the EU budget showing a weak and piecemeal commitment to gender equality. A gender equality perspective is hardly ever adopted particularly in those policy domains that are not seen as immediately related to women and gender equality, although with potential significant indirect gender effects like ICT, transport and social infrastructures, competition and regional development policies, environmental and macroeconomic policies.

Some important tools, like Gender Impact Assessment and Gender Budgeting, are still rarely adopted in the EU or national institutions and little attention has been given to the development of evaluation tools and methods for the assessment of the overall impact of gender mainstreaming as a strategy and its effectiveness compared to other approaches to gender equality.

Furthermore, gender mainstreaming still remains weakly institutionalised in the EU decision-making process. Gender equality units in the European Commission have limited power to interact on the same level with other decision-making bodies and with Member States.

Without clear objectives, dedicated resources and continuous monitoring based on gender-related indicators, there is a strong risk of downgrading gender equality goals in the public debate and in the policy agenda both at the EU and Member States level. A risk further exacerbated by the current backlash against gender equality in many Member States, which threatens to erode existing achievements and reduce protections against gender discrimination (Karamessini and Rubery, 2013; Kuhar and Paternotte, 2017).

## 2. GENDER MAINSTREAMING IN THE EU BUDGET AND MAIN FUNDING PROGRAMMES

Budgetary decisions are usually considered gender neutral, although they may have very different impacts on women and men, with the risk to exacerbate existing inequalities. Gender budgeting is a powerful tool for gender mainstreaming, as it supports the application of a gender perspective in the budgetary process, and the restructuring of revenues and expenditures in order to ensure that gender equality objectives are integrated consistently in all budget headings that are relevant for it (O'Hagan and Klatzer, 2018).

In the EU, the first attempt to introduce gender budgeting into the EU budgetary process was made in 2003, when the Advisory Committee on Equal Opportunities for Men and Women of the European Commission (European Commission, 2003) acknowledged the importance of budgets for policy making, and recommended the adoption of a gender mainstreaming approach in the EU budgetary policy. In the same year the European Parliament adopted a resolution on gender budgeting (European Parliament, 2003). In 2008, a study commissioned by the

European Commission's Directorate-General for Budget suggested that gender budgeting should first be adopted in the EU Multi annual Financial Framework (MFF) (European Commission, 2008), and the Commission's Strategy for equality between women and men 2010-2015 included the objective of advancing gender budgeting as part of EU budget. In 2017 the European Parliament adopted a new Resolution calling for all EU institutions to comply with EU's commitment to gender equality in the budgetary process, and the European Institute for Gender Equality (EIGE) produced a toolkit to assist the implementation of gender-responsive budgeting in the EU.

Notwithstanding the commitment of EU institutions, gender equality and gender mainstreaming are not yet internalised in the budget allocations and spending decisions of all EU programmes, and gender budgeting is not systematically streamlined in the EU MFF and the EU annual budget process.

Although a wide number of EU funding programmes and ad hoc instruments are currently declaring gender equality as a cross cutting objective, the lack of explicit reference to the budget allocated for gender equality measures makes it difficult to track allocations and expenditures. The gender dimension tends to disappear especially in those programmes where gender equality is stated as an overall horizontal objective, with no specific actions or conditions laid down on how to achieve it. Several programmes do not incorporate gender indicators and do not require the collection of gender-disaggregated or gender relevant data to monitor and evaluate the actions funded from the EU budget.

### *2.1. No clear commitment to gender equality in the EU MFF 2014-2020*

The EU Multiannual Financial Framework (MFF) sets targets for long-term spending, laying down the maximum annual amounts ("ceilings") which the EU may spend in different policy domains ("headings"). By specifying in which policy fields and how much the EU should invest over the seven years, the MFF is an expression of political priorities as much as a budgetary planning tool.

The EU MFF total financial resources for the period 2014-2020 are set at EUR 959.51 billion in commitments (2011 prices), equivalent to about 1% of the EU gross national income. For the first time the multiannual budget is lower than previous programming periods, down from 1.12% in the 2007-13 MFF, although it includes new programmes, such as Horizon 2020, the Connecting, Europe Facility, ERASMUS+, the Youth Employment Initiative, COSME, and European Fund for Strategic Investment (EFSI)<sup>6</sup>.

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<sup>6</sup> The MFF is part of a comprehensive package which also comprises the EU own resources and a set of sector-specific legislation defining the conditions of eligibility and the criteria for allocating funds for each EU spending programme. In the first years of implementation (2014-2015), the MFF has contributed to addressing the economic crisis and the resulting investment

The MFF 2014-2020 does not include gender equality among its objectives, but only a generic declaration that “the annual budgetary procedures applied for the MFF 2014-2020 will integrate, as appropriate, gender-responsive elements, taking into account the ways in which the overall financial framework of the Union contributes to increased gender equality (and ensures gender mainstreaming)” (Council of the European Union, 2011). In addition, many budget headings do not specify the amount allocated to gender policy objectives and actions. Similarly, the EU annual budgets show piecemeal commitments to gender equality.

Specific funds for gender equality measures are present mainly in programmes addressing employment and social inclusion issues or fundamental human rights, e.g. the European Social Fund (ESF), the Rights, Equality and Citizenship programme (REC), the Asylum, Migration and Integration Fund (AMIF), some External Aid programmes. Except for Horizon 2020, which includes specific actions for gender equality in research and innovation, the other EU programmes that could potentially support gender equality only provide some references to gender equality principles without specifying the budget allocated to it. Furthermore, some important investment programmes (like the European Development Fund and the Turkey Refugee Grant Facility) are defined and funded outside the Multiannual Financial Framework, further reducing the accountability of the EU budget decisions.

For these reasons financial and budgetary accountability is difficult and gender equality objectives risk being marginalised in spending decisions. In addition, the lack of gender-disaggregated data and indicators makes it impossible to track progress, and the Commission’s Mid-term Review of the MFF 2014-2020 (European Commission, 2016) does not provide any indication on the financial allocations and implementation in a gender perspective. Some information is only provided in the Commission Report on Equality between women and men (European Commission, 2019), stating that the overall EU funding allocated to achieving the objectives of the Strategic Engagement for Gender Equality 2015-2019 reaches EUR 6.17 billion (equivalent to 0.6% of the overall MFF commitments). This amount includes financial support to NGOs and civil society organisations promoting gender equality and women’s rights at national and local level.

The lack of a clear commitment to gender equality in the EU multi annual budget has been pointed out by a number of independent budget assessments. A 2012 assessment conducted for the European Parliament in preparation for the 2014-2020 MFF underlines that implementation and evaluation are still absent or incomplete (European Parliament, 2012). The study also underlines a lower gender awareness in the current MFF compared to the MFF for 2007-2013, most notably in the scarcity of explicit references to gender equality as a policy objective in its own right. A 2017 study for the European Parliament (IRS, 2017) also concludes

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gap, the refugee crisis, the internal and external security concerns, as well as climate change. In 2017 additional EUR 6.01 billion for the years 2017-2020 were allocated to further stimulate growth and jobs and to tackle the refugee crisis and security threats.

that the EU's commitment to gender equality and gender mainstreaming is not always acted on in budgeting decisions, and recommends greater transparency, as well as the enhanced use of gender-related indicators and a more systematic collection of gender-disaggregated data to monitor implementation.

Gender equality is little addressed also in the proposals for the forthcoming 2021-2027 MFF, besides generic statements. A recent study for the European Parliament underlines that the post 2020 MFF and Programmes' regulations do not incorporate gender equality as a horizontal principle with legal effects also in the case of those EU programme more directly related to gender equality i.e. the Justice, Rights and Values Programme, the ESF+, the European Global Adjustment Fund, Justice, Erasmus and Creative Europe (European Parliament, 2019).

## *2.2. The European Structural Investment Funds: low attention to gender equality in ERDF funded programmes*

With an overall budget of EUR 454 billion for 2014-2020, the ESI Funds are the European Union's main investment policy to support socio-economic and territorial cohesion. They account for 45% of the MFF 2014-2020 ceiling for commitments and their importance in supporting investments and growth has greatly increased in the last decade, as the ESIFs have been compensating for decreasing national investments<sup>7</sup>.

The ESI Funds, and particularly the European Social Fund (ESF) and the European Regional Development Fund (ERDF), constitute the most important financial support available for gender equality policy in the EU on a wide number of policy domains. The ESF promotes women's access to employment, career progression, a better work-life balance, and the reduction of educational segregation, while the ERDF could potentially contribute to gender equality in a more indirect way, supporting investments in care and education infrastructures and the reduction of gender gaps in business start-ups and entrepreneurship, in research and innovation, in access to transportation, ICT and social infrastructures.

The ESI funds' regulations on gender mainstreaming are relatively robust, especially in relation to labour market access, childcare infrastructures, work-life balance and non-discrimination measures. The Common Provisions Regulations on gender mainstreaming have been strengthened in the current programming period, and specific tools and guidelines have been developed for its implementation. Ex ante gender equality conditionalities and evaluations have raised awareness among managing authorities and project promoters at national and local level on the need to adopt a gender perspective in the programmes' implementation.

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<sup>7</sup> According to the European Commission, in 2014-2016 the commitments from ESIFs accounted for approximately 14 % of total public investment on average, with the highest share reaching beyond 70 % in some Member States. COM(2015) 639 final, Brussels, 14.12.2015 [http://ec.europa.eu/contracts\\_grants/pdf/esif/invest-progr-investing-job-growth-report\\_en.pdf](http://ec.europa.eu/contracts_grants/pdf/esif/invest-progr-investing-job-growth-report_en.pdf).

However, gender equality is not a thematic objective on its own with dedicated resources, and the ESIF regulations do not require to explicitly integrate gender equality into all the programmes' activities. Although the promotion of gender equality is a horizontal objective in all Funds, only the ESF regulations envisage a dedicated investment priority for gender equality in the labour market and require the production of gender-disaggregated and gender-relevant indicators. The regulations of the other ESI funds do not explicitly mention gender equality objectives and do not require statistics broken down by sex or gender-relevant indicators in monitoring systems, thus making it difficult to assess the actual amount of funds allocated to gender relevant measures in the implementation of national or regional programmes and the gender impact of actions supported by the Funds. In addition, the integration of gender equality objectives into Operational Programmes is voluntary, depending on the decisions of Member States and regions on the investment priorities on which to concentrate their programmes.

Estimations based on financial data available in the Open Cohesion database (IRS, 2018) show that the Member States' overall planned financial allocations on intervention fields that could potentially have gender equality effects, directly or indirectly, are significant, representing almost all the ESF allocations (92 %), and a significant share of ERDF allocations (55.3%), with higher proportions in Northern and Continental European countries. Out of these planned allocations, according to Commission data (European Commission, 2015) approximately EUR 5.85 billion were planned for measures directly promoting gender equality, with EUR 1.25 billion under the ERDF for investments in childcare infrastructures, and EUR 4.6 billion under the ESF, including EUR 1.6 billion planned for the gender equality investment priority chosen by only 12 Member States.

The extent to which these planned allocations are actually going to be spent to support gender equality crucially depends on the capacity of Member States and regions to implement interventions that take into account the gender dimension. Available evidence shows that a gender equality perspective and implementation capacity is often lacking in national and regional programmes and among stakeholders especially in the case of the ERDF programmes.

Recent studies (VVA, CSIL and IRS, 2018; IRS, 2018) show that in Partnership Agreements (PAs) gender equality issues are usually not considered in the policy domains covered by the ERDF and in implementation arrangements. Although in some countries gender equality coordination and support bodies have been created to facilitate gender mainstreaming, usually the PAs and Operational Programmes (OPs) do not provide any indication on how to ensure the application of the gender equality principle, e.g. in project selection procedures, projects' implementation, and in monitoring and evaluation systems. The implementation of the gender equality principle is perceived as difficult by a large share of ERDF managing authorities and projects' operators in Member States, largely due to the lack of experience in mainstreaming gender-relevant issues in the ERDF policy domains. To this end, investments in knowledge sharing, technical assistance, training

and awareness-raising among ERDF stakeholders and operators are particularly needed.

The little attention to gender equality in implementation emerges also in the evaluations of previous programming period. For example, concerning the European Social Fund, which should provide the largest amount of resources for gender equality, the evaluation of the 2007-2013 programming period (GHK Consulting and Fondazione Brodolini, 2011) shows that only 3.7 % of the total ESF resources on average for all Member States was allocated to specific gender equality actions. Employment measures were more likely to be adopted by Member States, while other gender-sensitive objectives related to poverty reduction, care services, women's empowerment were overlooked.

The *ex post* evaluation of the promotion of gender equality in the ERDF and Cohesion Fund 2007-2013 (Public Policy Institute, Net Effect, Racine, 2009) finds that the main ERDF intervention addressing gender equality in almost all the Member States was support to childcare infrastructures, while the main critical aspect underlined by the programmes' stakeholders was the lack of clear indications on how to intervene.

On May 2018, the Commission presented its draft regulation proposals for the 2021-2027 programming period. These proposals show an even lower attention to gender equality than the current ones, with gender equality not explicitly mentioned in the proposal for the ERDF and CF regulations<sup>8</sup>. Given the importance of ESIFs' regulations for the formulation of national and regional programmes, the reduced attention to gender equality is alarming, especially in this period of low political commitment to gender equality in many Member States.

### 2.3. *Horizon 2020: a low integration of the gender perspective in funded projects*

Horizon 2020 is the biggest EU research and innovation programme, with EUR 79.4 billion (2013 prices) of funding available over the period 2014 - 2020.

Gender equality is a cross-cutting principle and the programme regulation promotes gender balance in research teams, evaluation panels and advisory groups, and the integration gender/sex analysis in research contents. In addition, the "Science With and For Society (SwafS)" subprogramme includes a dedicated Call on "Gender Equality in Research and Innovation" (GERI), supporting institutional change in research organisations through the implementation of Gender Equality Plans.

However, as underlined by the Mid-term evaluation of gender equality in Horizon 2020 (European Commission, 2017), the SwafS, with a budget of about EUR

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<sup>8</sup> European Commission, *Proposal for a Regulation of the European Parliament and of the Council on the European Regional Development Fund and on the Cohesion Fund*, Strasbourg, 29 May 2018, <https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:52018PC0372&from=EN>.

43 million in the 2014-2017 Work Programme, is the least funded among the nine Horizon 2020 sub programmes of the Societal Challenges strand, representing only 1.5% of the total Societal Challenges budget. For the topic “Support to research organisations to implement gender equality plans”, the budget was even lower, around 14 million for the 2014-2015 Work Programme and 10 million for the 2016-2017 one.

Besides low funding for dedicated measures, attention to gender issues is lacking in the contents of funded research and innovation projects. According to a study conducted for the European Parliament (IRS, 2016), out of more than 10 thousand projects funded until September 2016, besides the GERI projects (i.e. those specifically dedicated to gender equality), only 71, addressed gender equality issues (0.007% in total). The majority of these projects (56%) were funded under the “Excellent Science” heading, largely through Marie Skłodowska-Curie actions supporting female doctoral candidates and experienced researchers. Another third was financed under the “Societal Challenges” heading and covered gender-related topics ranging from gender medicine to gender differences in job insecurity and gender occupational and sectoral segregation. In addition to these 71 projects, 9 GERI projects were funded under the SwafS programme with an overall budget of EUR 19 million. Of these, 6 projects supported research organisations in implementing Gender Equality Plans, while 2 developed evaluation and impact assessments tools on gender equality in research policy and research organisations, and one communication tools to encourage girls to study science.

The mentioned Mid-term evaluation of gender equality in Horizon 2020 underlines the improvements of the gender balance in decision-making, which is close to being achieved (the share of women reaches 53% in advisory groups and 36.7% in evaluation panels). However, the evaluation report also confirms the little integration of a gender perspective in the contents of funded research projects, with only few implementing an in-depth gender analysis and promoting a gender perspective in research contents and project design<sup>9</sup>. In addition, some of the Horizon 2020 monitoring indicators related to gender equality, i.e. the % of women among project coordinators and the % of projects taking into account the gender dimension in research content, are deemed as not reliable and overestimated.

The lack of clear objectives defined for the gender equality dimension and of gender expertise among applicants, evaluators and the Commission and Agency personnel, may explain the still little implementation of gender mainstreaming in the contents of research and innovation projects.

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<sup>9</sup> Of the 62 projects considered by project officers as having a gender content, only 11 take a gender dimension into account completely and 31 projects only partially. The report concludes that only 17 out of the 111 projects examined in depth include a gender dimension in a consistent way.

*2.4. The Rights, Equality and Citizenship 2014-2020 Programme (REC): a strong focus on gender equality with a small budget*

The REC programme is meant to ensure the rights and freedoms that people are entitled to under EU law. Among its nine objectives, one is explicitly related to gender equality and another to preventing and combating violence against women, children and young people and protecting victims and groups at risk.

The overall budget for the 2014-2020 period is EUR 439.5 million, relatively low compared to other EU programmes. The two objectives (gender equality and combating violence against women) account for around 35 % of the total REC funds (around EUR 154 million). Over the 2014-2016 period gender related projects were 27.9 % of the total REC projects (IRS, 2016). According to Commission's data (European Commission, 2019) in 2018 EUR 3.3 million have been granted to projects promoting good practices on combating stereotypes and segregation in the labour market, and EUR 3.7 million to projects incentivising the equal participation of women and men in leadership positions, and supporting the implementation of the Work-Life Balance for Parents and Carers' Initiative<sup>10</sup>. Another EUR 4.48 million was granted to projects addressing gender gaps over the life-cycle. Under the "Daphne" strand, EUR 15 million were granted to projects to prevent and combat gender-based violence, less than the budget allocated in previous years (going to from EUR 20 million in 2011, to 18 million in 2013).

*2.5. The Asylum, Migration and Integration Fund (AMIF): only few Member States dedicate specific funding to the integration of refugees and migrant women*

With a total budget of EUR 3.1 billion for 2014-2020 (current prices), plus the per capita lump sum allocated for the resettlement of each migrant or refugee<sup>11</sup>, AMIF supports measures addressing all aspects of migration including asylum, legal migration, integration and the return of irregularly staying non-EU nationals.

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<sup>10</sup> The Work-Life Balance for Working Parents and Carers Initiative was set up in 2017 with comprehensive package of complementary legal and policy measures to accompany the recently approved EU Work-Life Balance Directive. European Commission (2017), communication on an Initiative to support work-life balance for working parents and carers. Brussels, 26.4.2017 COM(2017) 252 final.

<sup>11</sup> The AMIF provides Member States with a lump sum amount of EUR 6 000 for each resettled refugee, and EUR 10 000 for each resettled refugee falling into one of the following categories: i) persons from a country or region designated for the implementation of a regional protection programme; ii) women and children at risk; iii) unaccompanied minors; iv) persons having medical needs that can be addressed only through resettlement; v) persons in need of emergency resettlement or urgent resettlement for legal or physical protection needs, including victims of violence or torture (<http://www.resettlement.eu/page/eu-funding-resettlement-erfamif>).

The Fund Regulation<sup>12</sup> provides for gender mainstreaming as a cross cutting issue in all the measures and for a specific measure supporting the social and economic integration of migrant women. Women also qualify for a higher financial support in resettlement measures.

In 2019 EUR 4 million were allocated to the integration of women, equivalent to 18.6% of the overall 2019 AMIF budget. AMIF regulations also require Member States to collect annual information on the number of migrants supported, but not on outcomes.

A report of the European Court of Auditors<sup>13</sup> underlines that only four EU Member States implement policies specifically addressing migrant women, and that no sex-disaggregated data are provided on beneficiaries of AMIF interventions. In addition, the special instruments mobilised in the last two years to top up the AMIF funds (the EU trust funds and the facility for refugees in Turkey with a budget of EUR 3 billion for 2016 and 2017) are outside the MFF and thus even more difficult to monitor, particularly in a gender perspective.

## 2.6. Low budget commitments to gender equality in other programmes with potential gender effects

Gender equality is a cross cutting objective in many other EU programmes, although it is not possible to assess the financial allocations earmarked for gender equality objectives and to monitor how they have been used, besides scattered information on some of the supported initiatives.

The programme for the *Competitiveness of Enterprises and Small and Medium-sized Enterprises (COSME)*, with a total budget of almost EUR 2.3 billion (current prices) managed by the European Investment Fund in cooperation with financial intermediaries in EU countries, includes among its main areas of action support to women entrepreneurs. COSME supported the creation of the European Network of Mentors for Women Entrepreneurs providing advice and support to women entrepreneurs in the start-up and consolidation of their business; the creation of a European E-Platform for Women Entrepreneurship; the European Network of Business Angels for Women Entrepreneurs created in 2016. There is however no monitoring data available on financial allocations and evaluations of the impacts of these measures.

The *ERASMUS+ Programme* for education, training, youth and sport has an allocation of almost EUR 14.8 billion (2013 prices) for the period 2014-2020. The promotion of gender equality and non-discrimination is explicitly mentioned in the programme regulation. An assessment of the ERASMUS mobility programme in

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<sup>12</sup> (EU) No 516/2014 of 16 April 2014 <http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32014R0514&from=EN>.

<sup>13</sup> European Court of Auditors (2018), The integration of migrants from outside the EU, Briefing Paper May 2018.

2011-12 (Böttcher et al., 2016) shows that 61% of ERASMUS students are female, a share higher (1.13 times) than the fraction of female students attending tertiary education in the involved countries. The over-representation of female students is systematic across subject areas and countries. Women also represented 51 % of staff involved in the staff mobility programme in 2012-2013 (European Commission, 2014).

The *European Fund for Strategic Investments (EFSI)*, adopted in June 2015, is meant to mobilise EUR 315 billion in new investment in key areas such as infrastructure, education, research and innovation, and to provide risk finance for small businesses. The gender equality horizontal principle is included in the statute of the EFSI and the investment areas can have significant gender equality effects. However, there is no indication of the gender composition of supported entrepreneurs and of the gender impact of supported projects.

The *Connecting Europe Facility (CEF)* with a total allocation of EUR 21.9 billion (2013 prices) supports the development of sustainable interconnected trans-European networks in energy, telecommunications and transport that would not be taken up by the market otherwise. Within this programme, financial support for the Safer Internet Digital Services Infrastructure and helplines in Member States for young victims of cyberbullying is particularly important for girls who are twice as likely than boys to be victims.

The *Employment and Social Innovation (EaSI) Programme* promotes high-quality and sustainable employment and social protection, as well as measures combating social exclusion and poverty. The programme is managed directly by the European Commission, with a total budget for 2014-2020 of EUR 919.5 million at 2013 prices<sup>14</sup>. The promotion of equality between women and men is a cross-cutting objective of EaSI, while gender specific measures are promoted mainly through the PROGRESS axis for the modernisation of employment and social policies, followed by the Microfinance axis. EUR 4.24 million under the PROGRESS axis have been allocated for social innovation projects related to work-life balance strategies at the workplace. The mid-term evaluation of EaSI (ICF, 2017) however underlines that the programme has been less relevant in promoting gender equality compared to the other programme objectives, although no gender disaggregated data on beneficiaries are provided in the evaluation.

Among *programmes supporting the EU external actions*, specific measures are dedicated to improving the lives of women and girls in many programmes, although often the financial allocations are small. According to EIGE (EIGE, 2017) only 29% of the overall Development Assistance Programme were allocated in 2014-2015 to programmes with gender equality as the main or significant objec-

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<sup>14</sup> The budget is distributed on three axes: the PROGRESS axis, for the modernisation of employment and social policies, with 61% of the total budget the EURES axis supporting job mobility in the EU, with 18% of the total budget; and the Microfinance and Social Entrepreneurship axis (supporting access microfinance and social entrepreneurship, with 21% of the total budget.

tive, against a stated target of 85%. For example, the Development Cooperation Instrument (DCI) allocates only EUR 100 million (out of a total budget EUR 19.7 billion, 2013 prices) to this objective. Gender equality and equal opportunities are among the cross-cutting issues to be addressed in the priorities of the European Neighbourhood Instrument (ENI), with an overall allocation of EUR 15 billion (current prices). The European Instrument for Democracy and Human Rights (EIDHR), with a total amount of EUR 1.3 billion (2013 prices), provides support for the promotion of democracy and human rights in non-EU countries, and includes among its redefined objectives a strong emphasis on vulnerable groups (including women), and on economic and social rights. Finally, the new 2014-2020 Instrument for Pre-accession Assistance for candidate countries (IPA II) with a budget of EUR 11.7 billion, includes the promotion of gender equality among its five main policy areas, although there is no gender analysis on its implementation.

### 3. POLICY IMPLICATIONS

In order to be effective, the EU's political and legal commitment to gender mainstreaming has to be operationalised and supported through predictable funding and allocations in budgetary and spending decisions. Greater transparency in financial allocations, enhanced use of gender-related indicators, and more systematic collection of gender-disaggregated data are also needed. More specifically:

- EU institutions should confirm their commitment to mainstream gender equality in the policy fields of their competence, ensuring that the proportion of funding for gender equality is not reduced in the MFF 2021-2027 and adopting appropriate gender mainstreaming tools in the policymaking processes.
- Gender Budgeting has to be reinforced in the EU budgeting process in order to translate political commitments into financial allocations for gender equality as a distinct policy objective in all headings of the EU budget with earmarked financial allocations for envisaged actions and policy objectives.
- Progress towards gender equality targets should be constantly monitored and evaluated in the annual and midterm reviews of the MFF. Annual reports and mid-term reviews and evaluations should include gender disaggregated indicators and assessments on how the financial allocations on gender objectives have been used and on the outcomes of funded measures.
- In all actions that receive funding from the EU budget, gender specific indicators should be collected and made available in order to ensure financial accountability and transparency.
- The intervention capacity of EU and Member States' institutions on gender mainstreaming should be improved by integrating a gender perspective in training programmes and providing technical support on the use of Gender Impact Assessment and Gender Budgeting tools, especially in relation to those policy domains not directly related to women but with significant potential effects on gender equality.

The new European Commission, headed for the first time by a woman and more gender balanced than the previous ones, could represent an opportunity for stronger gender equality policies. The creation for the first time of a Commissioner for Equality is an important step in this direction, although it is not yet clear the human and financial resources that will be devoted to this Direction General and its role in comparison to the other Directions.

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