

Gender budgeting debate EESC Commission for financial and budgetary affairs



PLATAFORMA PORTUGUESA
PARA OS DIREITOS
DAS MULHERES

Ana Sofia Fernandes
10.5.2022

Summary

- **Gender budgeting**
- **International, European and national commitments**
- **Portugal: 2018 State budget pilot-project**
- **Portugal State budget 2021 and 2022**

Resources, rights and power

- Costs of VAWG across the EU: 289 billion per year
- Costs of cyber harassment and cyber stalking against women between EUR 49 and EUR 89.3 billion
- About a third of women who have faced sexual harassment in the EU experienced it at work
- Nearly three quarters (72%) of all victims in the EU and 92% of victims trafficked for sexual exploitation are women and girls. Nearly a quarter of all victims of trafficking are children. Most of the child victims are EU citizens and trafficked for sexual exploitation

Resources, rights and power

- Female employment (20-64) reached 66.2% in 2020, but declined from 2019 by 0.9 percentage points due to COVID-19
- Gender pay gap was at 13% in 2020
- The full-time equivalent employment gender gap was 17.1% in 2020, largely reflecting prevalence of women among part-time workers (29.1% of employed women compared to 7.8% of men in 2020)
- In 2020, 13.8% of women, as opposed to 1.2% of men, were inactive because they were looking after children or incapacitated adults.
- With COVID-19, the share of women working from home overcame men also for all employed people: 21.8% of employed women, against 20.4% of employed men in 2020

Resources, rights and power

- The share of gender-mixed jobs in EU employment declined from 27% to 18% between 1998 and 2019
- In Europe all male founding teams received 91% of the capital invested in European tech, while 7% of capital went to mixed teams and less than 2% to all-female teams
- Only 1 in 3 STEM tertiary graduates is female, women represent only 20% of ICT graduates
- Women represent about 60% of minimum-wage earners in the EU

Resources, rights and power

- The available statistical data is not detailed enough to give a satisfying picture of the reasons for differences in pay. A recent statistical analysis of the gender pay gap published by Eurostat demonstrates that the unexplained residual part represents about 4/5 of the overall gap. Such a large residual gap in pay, after correcting for the different average characteristics of working women and men, suggests a need for further analytical work in that respect.
- The gender pension gap stood at 29.5% in 2019
- In the first lockdown period women spent 4.5 hours a week on average caring for older family members, or those with disabilities, compared with 2.8 hours for men.

Resources, rights and power

- Only 68% of women with informal care duties are engaged in paid work activities (employment, self-employment, paid apprenticeship or internship), whereas 81% of men do so
- Men continue to outnumber women in positions of political power in Member States' parliaments and governments. On average across the EU, women account for 33% of members of national parliaments and 32% of senior ministers in governments. Only 26% of leaders of major political parties are women
- In 2021, only around 30% of board members of the EU's largest publicly listed companies were women
- The top jobs are still largely occupied by men. Women still only hold less than 1 in 10 board chair and chief executive officer positions (respectively 8.5% and 7.8% in October 2021)

Resources, rights and power

- The governors of all EU national central banks are men
- On financial institutions, on the boards of national central banks women account for just over a quarter (26.4%) of key decisionmakers (i.e. members of the highest decision-making bodies) and 28.3% of deputy governor positions
- Historically, European financial institutions have been run largely by men. Despite the appointment of Christine Lagarde as the first female president of the European Central Bank (ECB), the boards of these institutions continue to be male dominated. In 2021, the executive board of the ECB counted only 2 women among its 6 members. During the same year, 8 of the 27 members of the board of the European Investment Bank (EIB) and 2 of the 6 members of the board of directors of the European Investment Fund (EIF)

Sex disaggregated data

- Collecting sex-disaggregated statistics that show differences between women's and men's starting points is the first step towards gender-sensitive policies and budgets
- Statistics disaggregated by sex should be developed and made available not only to ministries and civil servants, but to the entire population, allowing for a broader discussion on the gender impact of policies

The unavailability of indicators disaggregated by sex means that many policy decisions are taken without decision-makers having a clear picture of the situation and needs of women

Budgets are not neutral

- Public budgets are not mere technical documents; they reflect the way governments set their priorities and shape and implement their policies. Therefore, budgets are indicators of a government's commitment to meeting women's needs and achieving equality between women and men

Gender budgeting

- Involves a process through which it is assessed the contribution of public budgets to the achievement of equality between women and men
- Identifies the implications that different public expenditure and income options have for girls and women, as well as different groups of women, compared to their impact for boys and men
- **Final objective:** based on this diagnosis, introduce changes that guarantee the effective realization of equality between women and men

Gender budgeting

IT IS NOT	IT IS
Separate budgets for women	Including a gender perspective into budget planning and analysing budgets taking into account their impact on women and men, girls and boys
Only looking at the parts of the budget which have a social content or that are explicitly gender-related	Introducing a gender perspective into the entire budget, including seemingly “gender-neutral” budget lines
Demanding more spending and less taxes	Reprioritising and refocusing of spending and restructuring of taxation with a view to promote equality

Gender budgeting

- **Increases women's participation** in economic decision-making and the budget process
- Promotes a **wider public consultation and participation** in the preparation and monitoring of budget execution
- Increases governments **accountability for commitments** made to equality between women and men

State income and expenses

Roughly speaking, there are three major types of public expenditure, in addition to interest on public debt:

Transfers: e.g. pensions, family allowance, etc., aimed at securing income in situations such as old age, disability and unemployment

Services: public goods, investment and functioning of public services - defense and security, justice, education and health, etc.

Subsidies: e.g. agriculture subsidies

State income and expenses

On the **revenue** side, we can distinguish three main categories:

Taxes: direct (on income), and indirect (on consumption) such as the Value Added Tax, in addition to contributions to Social Security and etc.

Service usage fees: such as those for electricity, water, education, health, etc.

and **other funds**, including European funds, income from asset sales, income from financial investments, etc.

Policy options can have different impacts on women and men

Classification of public expenditure

Total expenditure = Sex-segmented expenditures + Equality-enhancing expenditures + Mainstream expenditures

Sex-segmented expenditures, concern the specific needs of women. Ex: women's reproductive health; preventing and combating violence against women and girls; single parent families with young children (85% headed by women)

Expenditures that promote equal opportunities and social cohesion aim at equality between women and men, such as those supported by parental leave, child support and other dependents' structures etc.

Mainstream expenditures, which in most countries make up more than 90%, aim to make goods and services available to the entire community. **These are perceived as neutral, so it is particularly important to analyse the differentiated impact of this share of expenditure on women and men**

Actors

Governments have a **fundamental political responsibility** and it is crucial to obtain political commitment from the highest policy makers

At the governmental level, it should be promoted by the **Ministry of Finance**, and specifically by the body responsible for budget planning, in close cooperation with the sector of equality

Other ministries play an important role in raising awareness and analysing the gender impacts of expenditure and public income, because each make the initial expenditure proposal in its sector of activity.

Women's NGOs play an important role in providing **expert knowledge** on the different impacts that budgets can have on women and men

Several dimensions of equality

The gender budgeting should be structured to explicitly consider other factors of inequality, which intersect with sex, such as age, disability, race, ethnicity, socio-economic status, territory of residence, among others

Gender budget analysis and gender budgeting

A **gender analysis of the budget** includes an analysis of the impact that expenditure and income have on women and men. **Gender budgeting is a more proactive process of re-prioritizing** in order to contribute to equality between women and men

Gender budgeting is always the consequence of a gender analysis of the budget

In a society committed to equality between women and men, a gender analysis of the budget, even if initially aimed at raising awareness, should, in the long run, always culminate in the production of a budget with a gender perspective

Gender mainstreaming

Gender mainstreaming: “The (re)organisation, improvement, development and evaluation of policy processes, so that a gender equality perspective is incorporated in all policies at all levels and at all stages, by the actors normally involved in policy-making”

Women and men have different needs and living conditions and circumstances, including unequal access to and control over power, resources, human rights and institutions, including the justice system. The situations of women and men also differ according to country, region, age, ethnic or social origin, or other factors. The aim of gender mainstreaming is to take into account these differences when designing, implementing and evaluating policies, programmes and projects, so that they benefit both women and men and do not increase inequality but enhance gender equality. Gender mainstreaming aims to solve – sometimes hidden- gender inequalities. It is therefore a tool for achieving gender equality

Gender budgeting

Gender budgeting is the introduction of the dimension of equality between women and men in budgetary **procedures** and their evaluation, and in the change of public budgets so that they contribute to the objective of equality between women and men. **A commitment to gender mainstreaming implies gender budgeting**

Gender equality forms an integral part of the European Union's fundamental values, enshrined in Articles 2 and 3 of the Treaty on European Union

Article 8 of the TFUE, stipulates that: "In all its activities, the Union shall aim to eliminate inequalities, and to promote equality, between men and women"

Good governance and economic efficiency

IMF - to promote economic growth and efficiency, transparency of public accounts is essential

World Bank- strong correlation between women's participation in decision-making and good governance

Gender inequalities have a negative impact on the overall performance of the economy and impose costs on society. **Gender equality could contribute to increasing GDP per capita by up to 9.6% by 2050 (EIGE)**

A gender analysis of the budget process helps to improve the allocation of resources and, at the same time, promotes equality between women and men. **Tool to introduce greater participation, transparency and accountability in budget policies**

Commitments

UN

- Beijing Platform for Action (1995)
- CEDAW
- SDGs: 2030 Agenda

European Union

Council of Europe

Portugal

- II National Plan for Equality (2003-2006)
- III National Plan for Equality – Citizenship and Gender, 2007-2010
- V Plan for Equality – Gender, Citizenship and Non-Discrimination 2014-2017
- **National Strategy for Equality and Non-Discrimination 2018-2030**

The work done in Portugal

Pilot-project in 2018

PORTUGUESE STATE BUDGET LAW n. 114/2017, OF 29 DECEMBER

Article 17 “Gender budgeting”

1 - By the end of the second quarter of 2018, government departments send to the member of the Government responsible for the area of citizenship and equality a strategic report containing a gender analysis of their sectorial public policies and the extent to which this analysis was reflected into gender budgeting.

2 - The reports (...) form the basis for the preparation, by the end of the 3rd quarter of 2018, of a general report by the Commission for Citizenship and Gender Equality. Guidelines for this report will be defined by Government members responsible for the areas of finance and citizenship and equality.

3 - By the end of 2018, the Government presents to the Parliament a proposal for a law establishing an annual report on the implementation of budgets with a gender impact.

PILOT PROJECT IN 2018

Involving a few selected ministeries

Ministry of Finance

Ministry of the Presidency of the Council of Ministries

Ministry of Health

Ministry of Education

Ministry of Internal Administration

Ministry of Justice

Ministry of Labour, Solidarity and Social Security

Examples of policy measures under analysis

Minimum salary

Parental leave

Active employment measures

Female condoms

Courts buildings

National Commitments

PORTUGAL

2018 | National Strategy for Equality and Non-Discrimination, 2018-2030

1.4.1 Implementation of artº 17º of the State Budget on <i>gender budgeting</i>	<i>Number of trainings on gender budgeting for technical staff in the areas of public administration and public finance in government departments</i>	Ministr y of the Preside ncy and Admini strative	All govern ment depart ments	18	19	20	21
	Number of persons covered by the annual trainings on gender budgeting	Moder nizatio n/CIG	NGO's	14	16	18	20
	Number of persons covered by on-the-job training	Ministr y of		12	12	12	12
	Number of sectoral gender impact reports produced	Finance /INA/D GO		6	7	8	9

Implementation

Dispatch No. 6687/2018 by the Secretary of State for Citizenship and Equality and General-Directorate of Budget appointed the selected ministries.

Operations was the responsibility of the Commission for Citizenship and Gender Equality, assisted by a team of experts in gender equality, gender mainstreaming, economics and finance from the Portuguese Platform for Women's Rights

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PARTE C

PRISIDÊNCIA DO CONSELHO DE MINISTROS

Estrutura de Missão para a Instalação do Sistema de Gestão Integrada de Fogos Rurais

Despacho n.º 6686/2018

1 — Ao abrigo do disposto na alínea c) do n.º 1 do artigo 3.º, nos n.ºs 1 e 2 do artigo 11.º e no artigo 12.º do Decreto-Lei n.º 11/2012, de 20 de janeiro, aplicáveis ex vi da alínea b) do n.º 3 da Resolução do Conselho de Ministros n.º 17-B/2017, de 27 de outubro, na redação dada pela Resolução do Conselho de Ministros n.º 33/2018, de 13 de março, designo Ana Cristina Diogo Marques Vicente, técnica superior do mapa de pessoal da Secretária-Geral da Presidência do Conselho de Ministros, para exercer funções de técnica especialista na Estrutura de Missão para a Instalação do Sistema de Gestão Integrada de Fogos Rurais, com a remuneração equiparada a adjunto.

2 — Para efeitos do disposto na alínea d) do artigo 12.º do Decreto-Lei n.º 11/2012, de 20 de janeiro, a designada desempenhará funções de intermediação institucional e de apoio técnico especializado em matéria de relações internacionais no processo de instalação da Agência para a Gestão Integrada de Fogos Rurais.

3 — Os encargos com a remuneração da designada são assegurados pelo serviço de origem, obtido o acordo deste, nos termos dos n.ºs 12 e 13 do artigo 13.º do Decreto-Lei n.º 11/2012, de 20 de janeiro, até ao limite da remuneração auferida no serviço de origem, sendo o remunemente suportado por verbas do orçamento deste gabinete.

4 — A designada fica autorizada a exercer, com acumulação, as funções públicas ou privadas referentes à realização de conferências, palestras, ações de formação de curta duração e outras atividades de idêntica natureza, nos termos das disposições conjugadas da alínea a) do n.º 3 do artigo 7.º e da alínea g) do artigo 12.º do Decreto-Lei n.º 11/2012, de 20 de janeiro.

5 — Para efeitos do disposto na alínea a) do artigo 12.º do citado decreto-lei, a nota curricular da designada é publicada em anexo ao presente despacho.

6 — Nos termos do n.º 3 do artigo 11.º do mencionado decreto-lei, o presente despacho produz efeitos a 2 de abril de 2018.

7 — Conforme o disposto nos artigos 12.º e 18.º do supracitado decreto-lei, publique-se na 2.ª série do *Diário da República* e publique-se na página eletrónica do Governo.

18 de junho 2018. — O Presidente da Estrutura de Missão para a Instalação do Sistema de Gestão Integrada de Fogos Rurais, *Thiago Martins de Oliveira*.

Nota curricular

Ana Cristina Diogo Marques Vicente, técnica superior do mapa de pessoal da Secretária-Geral da Presidência do Conselho de Ministros, é diplomada pela 10.ª Edição do Curso de Estudos

Avançados em Gestão Pública (CEAGP) do INA (2010); detém um Mestrado em Administração e Gestão Públicas pela Universidade de Aveiro (2013); vencedor do prêmio de melhor aluno da Pós-Graduação em Prospetiva, Estratégia e Inovação do ISEG/DEFE (2014-2015); sendo mestranda em Avaliação de Programas e Políticas Públicas no Centro de Estudos de Gestão da Universidade Complutense de Madrid.

Atualmente a 13.ª edição do Programa de Mestrado, promovido pela Fundação Robert Bosch e pelo Gabinete de Burocratização, realizou, ao abrigo deste programa, um *secondment* na Agência de Evaluación y Calidad, em Espanha (Madrid), de outubro de 2016 a dezembro de 2017. *External Consultant* do Centro Internacional de Formação da Organização Internacional de Trabalho, em matéria de sistemas de monitorização e avaliação, e *Investid Consultant* da AITA Research & Consulting, com temas de *foreign* e gestão estratégica.

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Diário da República, 2.ª série — N.º 131 — 10 de julho de 2018

PRISIDÊNCIA DO CONSELHO DE MINISTROS E FINANÇAS

Gabinetes da Secretária de Estado para a Cidadania e a Igualdade e do Secretário de Estado do Orçamento

Despacho n.º 6687/2018

Os orçamentos nacionais são instrumentos fundamentais para a concretização das políticas públicas. A sua conceção e aplicação podem ter impactos desiguais na vida das mulheres e dos homens, das raparigas e dos rapazes, uma vez que os estereótipos de género determinam consequências diferenciadas nas respetivas condições de vida, satisfação de necessidades e estrutura social e económica. A estes acrescentam outros impactos resultantes de fatores múltiplos, tais como a idade avançada, deficiência, raça, etnia, estatuto socioeconómico, território de residência, que moldam a natureza, a amplitude e a profundidade das desigualdades de género.

Os orçamentos com impacto de género correspondem à efetivação do *mainstreaming* de género no processo orçamental, compreendendo a reconstrução das receitas e das despesas com o objetivo de promover a igualdade entre mulheres e homens.

A elaboração de orçamentos com impacto de género tem vindo a ser adotada por um número crescente de países, apresentando a dupla vantagem de operacionalizar a transversalização da perspetiva de género no desenho e implementação das políticas públicas ao mesmo tempo que concorre para promover a boa governação, a eficiência económica, a transparência e a prestação de contas no processo orçamental.

A Lei n.º 114/2017, de 29 de dezembro, diploma que aprova o Orçamento do Estado para o ano de 2018, determina no artigo 17.º a obrigatoriedade dos departamentos governamentais apresentarem um relatório estratégico referente à análise de género nas respetivas políticas públicas setoriais e a sua tradução na construção de orçamentos com impacto de género.

Prevê, ainda, a elaboração de um relatório geral pela Comissão para a Cidadania e a Igualdade de Género, nos termos a fixar pelos membros do Governo responsáveis pelas áreas das Finanças e da Cidadania e Igualdade, tendo em vista a apresentação pelo Governo à Assembleia da República, até ao final de 2018, de uma proposta de lei que institua um relatório anual sobre a implementação de orçamentos com impacto de género.

Assim, nos termos do previsto no artigo 17.º da Lei n.º 114/2017, de 29 de dezembro, a Secretária de Estado para a Cidadania e a Igualdade, ao abrigo de competência delegada conforme Despacho n.º 10437/2017, de 13 de novembro, da Ministra da Presidência e da Modernização Administrativa, publicado no *Diário da República*, 2.ª série, n.º 231, de 30 de novembro, e o Secretário de Estado do Orçamento, ao abrigo de competência delegada conforme Despacho n.º 7316/2017, do Ministro das Finanças, publicado no *Diário da República*, 2.ª série, n.º 160, de 21 de agosto, determinam o seguinte:

1 — O disposto no artigo 17.º da Lei n.º 114/2017, de 29 de dezembro, é concretizado através de uma ação piloto, abrangendo um conjunto limitado de medidas ou ações setoriais de política, as quais deverão assegurar uma natureza, objetivos e abrangência variadas, devendo constituir-se fundamentalmente como exemplificativas e demonstrativas de um processo que se pretende progressivo, sustentado e consistentemente ampliado e generalizado no futuro.

2 — O relatório geral a elaborar pela Comissão para a Cidadania e a Igualdade de Género deve conter os indicadores ao nível nacional, a contar no relatório anual a tratar na proposta de lei a apresentar à Assembleia da República, relevantes para a avaliação do progresso registado.

3 — O relatório geral deve refletir a análise de género das políticas públicas setoriais que foram objeto dos relatórios estratégicos elaborados pelos respetivos representantes dos departamentos governamentais envolvidos, assim como a sua tradução na construção de orçamentos com impacto de género.

4 — O relatório geral deve ser estruturado da seguinte forma:
a) Realizações: descrição do processo no âmbito da ação piloto; iniciativas legais, institucionais e procedimentais;

GENDER BUDGETING INTERNATIONAL WORKSHOP



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CONCEPT NOTE

Gender budgeting international workshop

14 JUNE 2018, LISBOA, PORTUGAL

Appointed delegates from the participating ministries; counsellors for equality of the ministries and corresponding inter-departmental teams; members of the Parliament; members of the Portuguese Platform for Women's Rights; others.

GENDER BUDGETING IN THE STATE BUDGET METHODOLOGICAL GUIDE FOR THE PORTUGUESE STATE

July 2018

<https://www.cig.gov.pt/2019/06/relatorio-geral-orcamento-impacto-genero-5rs/>



21H TRAINING PACKAGE

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10 Set, 2018, 23:15 | País



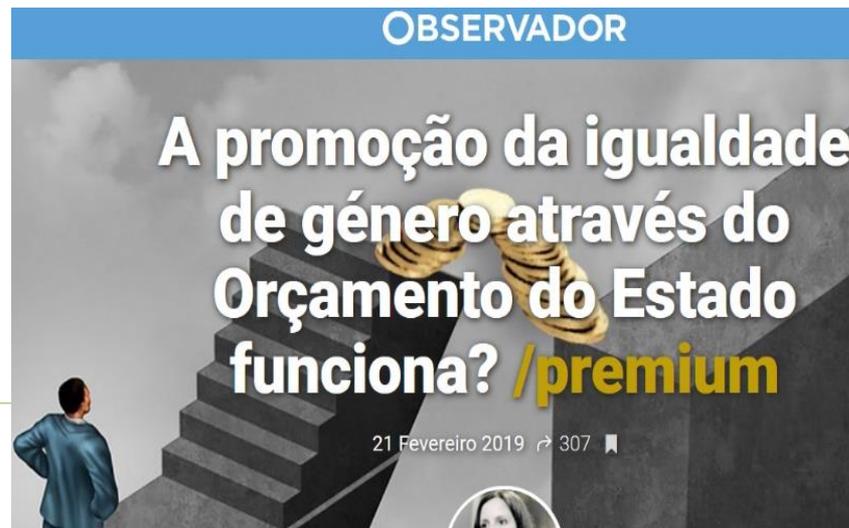
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RTP

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March- October 2018

The pilot project was a process involving all the actors, in a collective construction for eight months that involved components of:

- information and awareness raising
- capacity building
- exchange of experiences, difficulties and solutions
- training

Between March and October 2018, took place informative and training work sessions involving all the actors in the process, as well as bilateral specific work meetings with sectoral ministries

Deliverables

- International workshop on gender budgeting
- Methodological Guide for Gender Budgeting in the Portuguese State Budget
- Template for analysis of the sectorial public policies from a gender perspective
- Development of Annex IX-A “Budgets with Gender Impact” of the State Budget Circular
- Development of a training package of 21 hours on gender budgeting
- General Report 5Rs: Who (representation) gets what (resources) and why or why not (reality and rights)
- Inclusion of Art.º 16º at the Decree-Law No. 84/2019, of 28 June, which established the rules for implementing the State Budget for 2019

Template for sectorial reports

IMPACTO DE GÉNERO DO ORÇAMENTO

Ficha de Análise

Data da análise:

DADOS GERAIS - IDENTIFICAÇÃO E CARACTERIZAÇÃO DA MEDIDA/AÇÃO DO PROJETO PILOTO

Departamento Governamental:

Organismo(s):

Serviço responsável pela análise:

Identificação/designação da medida/ação:

Enquadramento legislativo e/ou normativo (nomear os documentos):

Objetivos gerais da medida/ação:

Annex IX-A “Budgets with Gender Impact” of the State Budget Circular: Instructions for the preparation of the State Budget 2019 (August)

III – Orçamentos com impacto de género

9. Os ministérios devem conduzir esforços no sentido da incorporação da perspetiva de género nos seus planos orçamentais devendo, no «**Anexo IX-A – Elemento complementar à memória justificativa do PO – orçamento de género**» enviar informação sobre os Programas/Atividades/Medidas a submeter a análise do impacto de género em 2019.
10. Este elemento deve igualmente apresentar o impacto da implementação de orçamentos com impacto de género.
11. O **Anexo IX-A** a esta Circular será submetido em conjunto com o Projeto de orçamento, nos Serviços Online da DGO - PO.

Annex IX-A “Budgets with Gender Impact” of the State Budget Circular: Instructions for the preparation of the State Budget 2019 (August)

Anexo IX-A

Memória justificativa do Projeto de Orçamento - Orçamento de Género

OE2019

Ministério	Organismo	Programa	Medida	Atividade	Classificação Económica Agrupamento	Fonte de Financiamento	Despesa (euros)
						RG, RP, FE	

(inserir linhas no quadro, caso necessário)

Este anexo será submetido no módulo PO – Projetos de Orçamento, dos Serviços online da DGO

Annex IX-A “Budgets with Gender Impact” of the State Budget Circular: Instructions for the preparation of the State Budget 2019 (August)

Implementação de orçamentos com impacto de género

1 - Iniciativas analisadas numa perspectiva de orçamentos com impacto de género

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2 - Alterações a introduzir na Proposta do Orçamento do Estado como resultado da análise de receitas e despesas numa perspectiva de género

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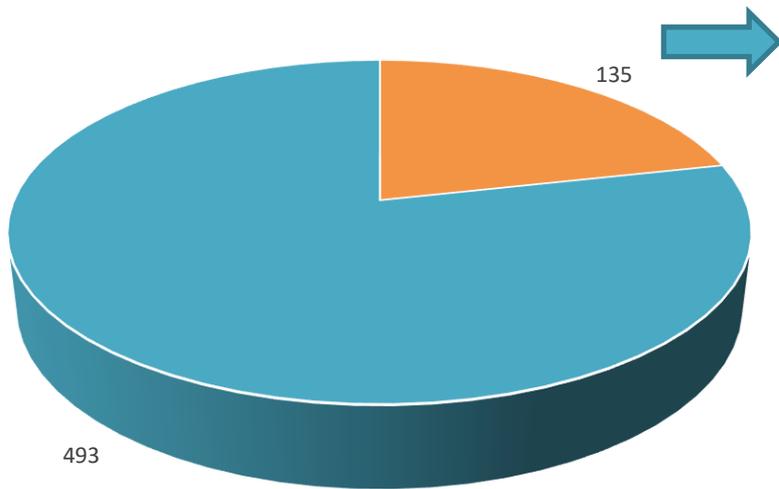
3 - Oportunidades de melhoria identificadas para promover a implementação de orçamentos com impactos de género

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Alguma dúvida no preenchimento deste Anexo deve ser esclarecida com a Comissão para a Cidadania e Igualdade de Género

ANSWERS TO ANNEX IX-A

628 entities from Public Administration



Took part in the pilot project in 2018	4 3%
Did not take part in the pilot project	131 97%

ANNEX IX-A

Ministry	N.º de entidades
MINISTRY OF HEALTH	27
MINISTRY OF SCIENCE, TECHNOLOGY AND HIGHER EDUCATION	24
MINISTRY OF WORK, SOLIDARITY AND SOCIAL SECURITY	12
MINISTRY OF DEFENSE	8
ENTITIES WHO ARE NOT PART OF THE PUBLIC ADMINISTRATION	8
MINISTRY OF JUSTICE	8
MINISTRY OF ENVIRONMENT	7
MINISTRY OF INTERNAL AFFAIRS	6
MINISTRY OF ECONOMY	5
MINISTRY OF EDUCATION	5
GENERAL CHARGES OF THE STATE	5
MINISTRY OF CULTURE	4
PRESIDENCY OF THE COUNCIL OF MINISTERS	4
MINISTRY OF AGRICULTURE, FORESTS AND RURAL DEVELOPMENT	3
MINISTRY OF PLANNING AND INFRASTRUCTURES	3
MINISTRY OF FINANCE	2
MINISTRY OF THE SEA	2
MINISTRY OF FOREIGN AFFAIRS	2
TOTAL	135

ANSWERS TO ANNEX IX-A

	Did not answer/ Answer not relevant	Trainings on equality between women and men	Mention of compliance with the law	Staff distribution	Relevant	Total
N.º of entities	87	6	4	14	24	135
N.º of answers	260	18	11	43	73	405



Responses like: Nothing to report; Not applicable; Nothing to say; No changes are foreseen in income or expenditure from a gender perspective. Or not filling in the descriptive fields.

ANSWERS TO ANNEX IX-A

WHAT DO SOME ANSWERS REVEAL?

Different levels of knowledge about:

- Equality between women and men
- Gender mainstreaming
- What it is gender budgeting

Interest on the part of some entities in responding appropriately and in proposing alternative ways of collecting information

Willingness to know more or better policies that promote equality between women and men

ANNEX IX-A

RECOMMENDATIONS

- Subject Annex IX-A to a critical review and eventual introduction of improvements
- Clearly invest in gender budgeting training
- Consider specialized support in completing Annex IX-A of the Circular of the State Budget
- Report in the General State Account reporting, on the policy measures that some entities have listed (accountability)

Decree-Law of Budget Execution

Artigo 16.º

Decree-Law nº
84/2019, of 28 June,
established the norms
for the execution of
the State Budget for
2019

Acompanhamento da execução dos orçamentos com impacto de género

1 — Para efeitos de acompanhamento da execução dos programas, medidas e atividades submetidas a análise de impacto de género, nos termos do artigo 15.º da Lei do Orçamento do Estado, cada coordenador do programa orçamental deve compilar a informação remetida pelos respetivos serviços e entidades no momento da preparação do orçamento e definir indicadores para a avaliação do impacto de género.

2 — A informação relativa ao orçamento com impacto de género a que se refere o número anterior é enviada pelos coordenadores dos programas orçamentais à Comissão para a Cidadania e a Igualdade de Género (CIG) e à DGO, nos termos a definir por portaria dos membros do Governo responsáveis pelas áreas da igualdade e das finanças, que estabelece as orientações para a construção dos indicadores referidos no número anterior.

**General report on gender
budgeting – 5RS: General Report
5Rs: Who (representation) gets
what (resources) and why or
why not (reality and rights)**

5RS

Who (representation) gets what (resources) and why or why not (reality and rights)?

Reality

Representation

Resources and Results

Recommendations

5RS

The scarcity of data disaggregated by sex in sectoral reports implied the presentation of generic indicators for large areas of government intervention and prevented an effective diagnosis

Representatives of the Ministries reported difficulties in obtaining statistical information disaggregated by sex:

- inadequacy of data collection software/information system
- lack of information handling routines

and **detailed financial information:**

- derives from the current model of elaboration and current structure of the State Budget and can only be completely overcome **when a model of budgeting by policy programs is adopted**

Impossibility of detailed characterization of the recipients, beneficiaries and users of the measures for most of the selected measures and impossibility of knowing the percentage of the State Budget covered by the analysis

Recommendation 2: The dearth of sex-disaggregated data should be identified from the outset and action taken to alleviate it. Each department to be involved in 2019 must define a priori a set of key macro (government domain) and micro (directly related to the measures to be analysed) level indicators. The process of reforming the State Budget elaboration methodology should be reviewed in the sense of budgeting by policy programs

Note: Implementation of the Budgetary Framework Law of budgeting by policy programs is delayed in Portugal.

5RS – Recommendations - critical aspects

Budgets with a gender perspective are an ongoing process that has to be ensured and coordinated by internal structures, with external expert support.

In the countries where it has had the most impact, civil society, in particular organizations that defend and promote equality between women and men, have been involved, as was the case in Portugal's pilot project.

5RS – In-house team

The internal team: necessary resources and defined responsibilities

- Coordinate the implementation process with the various State agencies
- Dynamically engage ministerial equality counsellors
- Define the work program at the beginning of each year, namely: ministries involved, profile of the team in each ministry, calendar, definition of objectives, training plan, etc.
- Ensuring compliance with the stipulated program
- Manage and improve support tools, namely the Methodological Guide and the Gender Impact Analysis Template
- Ensure implementation evaluation, coordinating the final report preparation process
- Produce/disseminate awareness-raising and information materials on the CIG website, at Parliament events and other public events

5RS – In-house team

The team's functions must be unequivocally included in the annual evaluation objectives, both team and individual

The internal team must be composed of members who:

- ensure the continuity of the project
- have (or are willing to acquire) training in the field
- ensure the multidisciplinary of the project, namely at the economic-financial level and in women's studies
- have a dynamic profile and critical spirit, since implementation is a process of continuous improvement that is not stabilized yet

The internal team must be supported by an external team:

- a) Training
- b) On-job support to ministerial teams
- c) Consulting for process and calendar definition

5RS – Commitment from all parties

The commitment of the ministerial teams requires:

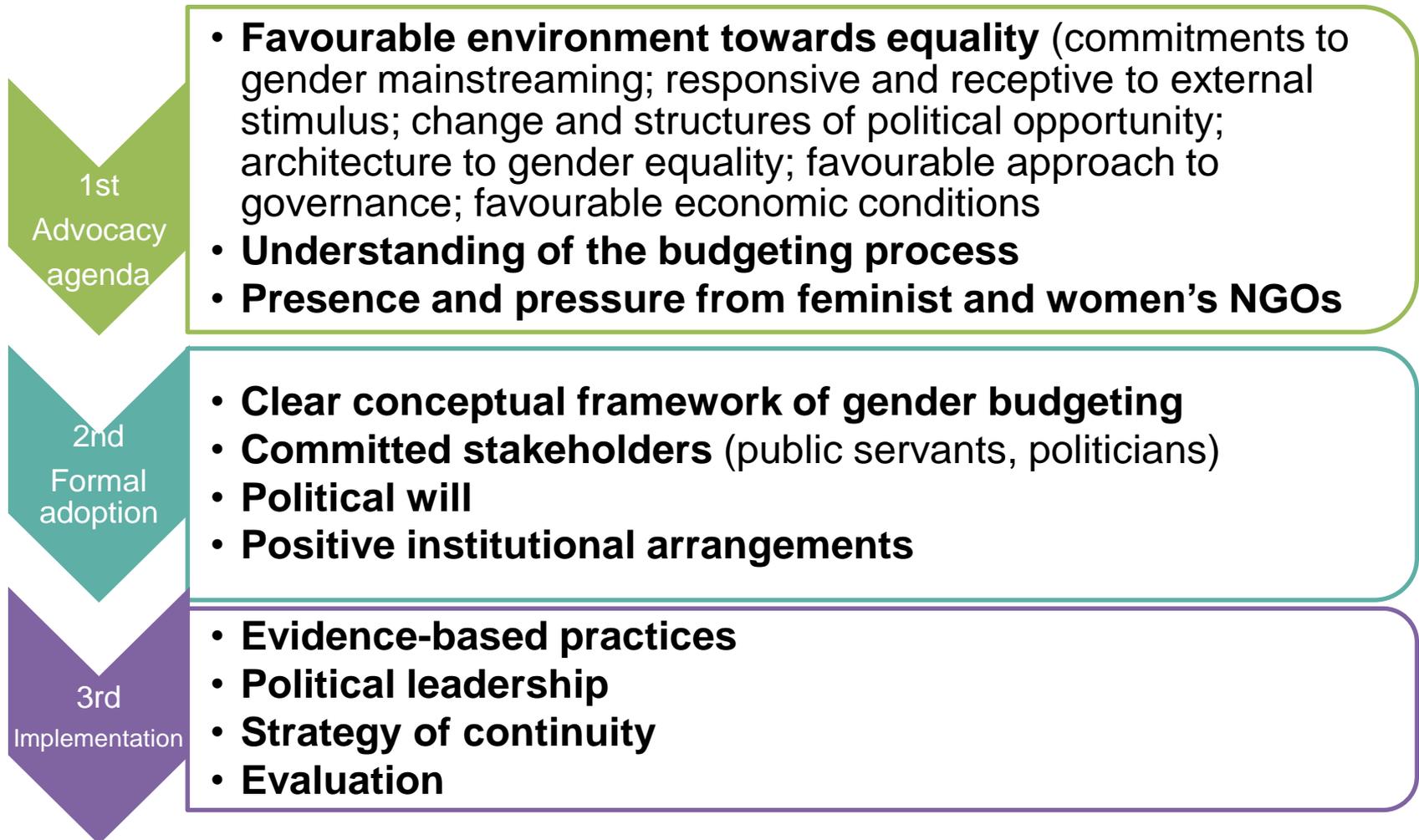
- a) prior definition of the team profile that each ministry must designate, in order to guarantee homogeneous criteria and good project execution
- b) commitment of the directors
- c) inclusion of the implementation of budgets with a gender perspective in individual and collective objectives
- d) articulation with the ministerial councillors

Although only designated ministerial teams have access to implementation details, it must be communicated in a simple and transversal way to the entire public administration what budgets with a gender perspective consist of and what their objectives are

The analysis of policy programs should be supported by on-the-job training and support provided by the CIG and by external teams

5RS – Visibility

Implementation is only consequential if it has visibility, we recommend that a chapter be included in the report that annually accompanies the State Budget Proposal



State Budget 2021

- Prior assessment of the gender impact of the proposed State Budget Law for the year 2021

(...) pursuit of a policy of disaggregation by sex of administrative data produced by the Central Administration. (...) includes measures that will necessarily reinforce policies that contribute to gender equality: Support Program for the Reduction of Public Transport Tariffs (PART); Extending free day care to all children who attend public day care centers or those covered by the cooperation system and whose household belongs to the 2nd income bracket of the family contribution;

State Budget 2021

- Prior assessment of the gender impact of the proposed State Budget Law for the year 2021 (cont)

Investment program for the expansion and requalification of social equipment in the public network and in the social and solidarity sector, including the creation and requalification of equipment and social responses in the areas of the elderly, support for children and people with disabilities, which promote increased capacity and the quality of social responses; Extraordinary Support to Workers' Income, including domestic service workers; Extraordinary pension update.

State Budget 2021

- Prior assessment of the gender impact of the proposed State Budget Law for the year 2021 (cont)

(...) compliance with the laws of balanced representation, parity and equal pay. (...) investment in training workers in terms of equality and non-discrimination (especially in the area of reconciling professional, personal and family life), and the creation of mechanisms to ensure that teleworking does not exacerbate pre-existing social asymmetries between women and men , and that promote gender equality..

State Budget 2021

- Prior assessment of the gender impact of the proposed State Budget Law for the year 2021 (cont)

At the same time, and in conjunction with the Action Plan for the Digital Transition, the commitment to promoting the digital inclusion of women and their respective participation in information and communication technologies will be reinforced.

State Budget 2021

- State Budget Report 2021

In conjunction with the Strategy for Innovation and Modernization of the State and Public Administration 2020-2023, the pursuit of a policy of disaggregation by sex of administrative data produced by the Central Administration

Pursuing the budgeting process with a gender perspective, through the identification of specific impact indicators in various areas of government

State Budget 2021

- State Budget Report 2021

With a view to integrating the gender perspective into public policies embodied in the State Budget, this report includes a set of indicators that support an annual exercise to assess progress in the field of equality between women and men by monitoring the respective evolution over time, revealing impacts, as well as the need for intervention in public policies, namely at the budgetary level, according to the document contained in the Informative and Complementary Elements — Budget with a Gender Perspective. (cont)

State Budget 2021

- Informative and Complementary Elements
Chapter 4. Budgeting with a Gender Perspective

Identification of objectives, indicators and measures/actions within the scope of the strategic challenges related to: climate change, the demographic challenge, the construction of a digital society and the reduction of inequalities.

Desafio estratégico	Combater as alterações climáticas
Objetivos	<p>Promover a participação, associativismo, capacitação e empreendedorismo das mulheres na agricultura</p> <p>Desenvolver políticas de mobilidade promotoras da igualdade entre mulheres e homens</p>
Indicadores	<p>Produtores agrícolas singulares <40 anos 25,1% mulheres e 74,9% homens 2016 (INE)</p> <p>Vítimas mortais por acidente de viação 20,6% mulheres e 79,4% homens 2018 (INE)</p> <p>Deslocações/dia por transporte coletivo na Área Metropolitana de Lisboa 60,4% mulheres e 39,6% homens 2017 (INE)</p> <p>Deslocações/dia por transporte individual na Área Metropolitana de Lisboa 50,5% mulheres e 49,5% homens 2017 (INE)</p> <p>Deslocações/dia por transporte coletivo na Área Metropolitana do Porto 59,0% mulheres e 41,0% homens 2017 (INE)</p> <p>Deslocações/dia por transporte individual na Área Metropolitana do Porto 49,3% mulheres e 50,7% homens 2017 (INE)</p>
Medida/ação OE 2021	<p>Estratégia de Segurança Rodoviária 2021-2030</p> <p>Agenda de Inovação para a Agricultura 2020-2030</p> <p>Programa de Apoio à Redução do Tarifário dos Transportes Públicos (PART)</p>

Desafio estratégico**Responder ao desafio demográfico****Objetivos**

Promover a conciliação entre a vida profissional, pessoal e familiar

Promover uma divisão igual do trabalho de cuidado e doméstico entre mulheres e homens

Indicadores

Homens que partilharam a licença de 120/150 dias

41,9% | 2019 (CITE)

Homens que receberam subsídio por licença parental obrigatória do pai

77,4% | 2019 (CITE)

Homens que receberam subsídio por licença parental facultativa do pai

72,0% | 2019 (CITE)

Cobertura média no continente das respostas para a primeira infância (creche e ama)

48,4% | 2019 (MTSSS/GEP)

Cobertura média no continente das Estruturas Residenciais para Pessoas Idosas, Centros de Dia e Serviços de Apoio Domiciliário para pessoas idosas

12,5% | 2019 (MTSSS/GEP)

Medida/ação OE 2021

3 em Linha - Programa para a Conciliação da Vida Profissional, Pessoal e Familiar, incluindo o processo de certificação de entidades com um sistema de gestão da conciliação baseado na NP4552:2016 e o desenvolvimento de projetos direcionados para a igualdade no mercado de trabalho no âmbito do Programa Conciliação e Igualdade de Género

Alargamento da gratuidade de frequência de creche a todas as crianças que frequentem creche pública ou abrangida pelo sistema de cooperação e cujo agregado familiar pertença ao segundo escalão de rendimentos da comparticipação familiar

Programa de investimento para alargamento e requalificação dos equipamentos sociais da rede pública e do setor social e solidário, incluindo a criação e requalificação de equipamentos e respostas sociais nas áreas de idosos, de apoio à infância e às pessoas com deficiência, que promovam aumento da capacidade e da qualidade das respostas sociais

Objetivos

Promover a inclusão digital e a participação das mulheres e raparigas nas áreas das tecnologias de informação e comunicação

Incorporar a perspetiva de género como dimensão central dos modelos de gestão inovadores na Administração Pública

Indicadores

Mulheres especialistas em TIC em % do emprego feminino

0,7% | 2018 (DESI)

Novos alunos inscritos no ensino superior na área das TIC

18,4% mulheres e 81,6% homens | 2018/2019 (DGEEC)

Alunos inscritos no ensino superior na área das TIC

17,2% mulheres e 82,8% homens | 2018/2019 (DGEEC)

Diplomados no ensino superior na área das TIC

17,4% mulheres e 82,6% homens | 2018/2019 (DGEEC)

Serviços e organismos com dados desagregados por sexo publicitados

A recolher a partir de 2020

Medida/ação OE 2021

Promoção da inclusão digital das mulheres e respetiva participação nas TIC, no âmbito do Plano de Ação para a Transição Digital, Engenheiras por 1 Dia e INCoDe2030

Inscrição de objetivos de boa gestão dos trabalhadores, designadamente no domínio da conciliação da vida profissional com a vida pessoal e familiar nos Quadros de Avaliação e Responsabilização para 2021 dos serviços públicos

Promoção da publicitação de dados administrativos desagregados por sexo, no âmbito dos programas, atividades ou medidas desenvolvidos em 2021 pelos serviços e organismos

Promoção da inovação e da transição digital na gestão pública, concretizando a Estratégia para a Inovação e Modernização do Estado e da Administração Pública 2020-2023

Desafio estratégico	Reduzir as desigualdades
Objetivos	<p>Garantir as condições para uma participação plena e igualitária de mulheres e homens no mercado de trabalho e na atividade profissional</p> <p>Prevenir e combater a violência contra as mulheres e a violência doméstica</p>
Indicadores	<p>Disparidade na remuneração base e ganho 14,4% na base e 17,8% no ganho 2018 (MTSSS/GEP)</p> <p>Mulheres nos órgãos de administração das empresas cotadas 22% mulheres e 78% homens 2019 (CIG)</p> <p>Dirigentes superiores da Administração Pública 40,8% mulheres e 59,2% homens 2T 2020 (DGAEP)</p> <p>Beneficiários do subsídio de desemprego 57,6% mulheres e 42,4% homens 2020</p> <p>Trabalhadores a receber RMMG 50,6% mulheres e 49,4% homens 2020</p> <p>Pensionistas com pensões até 1 IAS 61,7% mulheres e 38,3% homens 2019</p> <p>Ocorrências por violência doméstica registadas pelas forças de segurança 29 498 ocorrências 2019 (RASI)</p> <p>Vítimas de violência doméstica registadas pelas forças de segurança 76,1% mulheres e 23,9% homens 2019 (RASI)</p> <p>Pessoas acolhidas na Rede Nacional de Apoio às Vítimas de Violência Doméstica 1982 mulheres, 18 homens e 1634 dependentes 2019 (CIG)</p>

Medida/ação OE 2021

Assegurar o cumprimento das leis da representação equilibrada e da igualdade remuneratória

Majoração do limite mínimo do subsídio de desemprego

Apoio Extraordinário ao Rendimento dos Trabalhadores, incluindo trabalhadores do serviço doméstico

Atualização extraordinária de pensões

Reforço da formação para o combate à violência contra as mulheres e a violência doméstica

Concretização da Resolução do Conselho de Ministros n.º 139/2019, de 19 de agosto, que aprova medidas de prevenção e combate à violência doméstica, assim como do IV Plano de Ação para a Prevenção e Combate ao Tráfico de Seres Humanos

Alargamento e a especialização das estruturas da Rede Nacional de Apoio às Vítimas de Violência Doméstica

Reforço das políticas públicas de habitação, procedendo ao aumento da oferta pública de habitação, assente na criação de uma resposta habitacional urgente e temporária, na reestruturação do parque de habitação social e na promoção de um parque habitacional público a custos acessíveis

Aumento das dotações na medida 082 - Segurança e Ação Social – Violência doméstica - Prevenção e proteção à vítima

State Budget 2022

[Project law proposal n°4/XV/1^a \(art° 14°\)](#)

[Report of the State Budget](#)

[Complementary and additional elements](#)

[Prior assessment of the gender impact of the State Budget 2022](#)

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“ Ignoring the feminist perspective is bad economics. The discipline aims to explain the allocation of scarce resources; it is bound to go wrong if it ignores the role that deep imbalances between men and women play in this allocation. As long as this inequality exists, there is space for feminist economics.”

The Economist, March 12, 2016