

Gender Budgeting in public institutions

State of the Art-Next steps

**Extraordinary EESC's Commission
for finances & budgetary affairs
(CAF) meeting**

Sala Santi room, CGIL

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**Marion Boeker,
Independent expert
Gender Budgeting**

**Member of European Women's
Lobby (EWL) Gender Budgeting
Expert Group**

1. Herstory & History – From ideas to the practices of Gender & Human Rights Budgeting

How and when did people from the European Civil Society including women demand access on budget decisions for better steering and well being & gender equality, social justice and peace?

From a King's Treasurer's closed box to an transparent participatory the people in their diversity and human rights serving budget we want!

Oikos- When will a woman be a free & equal subject

- The European philosophical & political concept of human beings in the state is based on the greek/roman model of
 - **OIKOS** → and the **dual opposite, hierarchical subordinated sexes**
 - **Men** = *[un/free] qualified for citizenship & a public subject of the economy*
 - **Women** = *[always unfree] depending as daughter, wife, to a home of some men*
 - *subordinated object of state, men's or familie's, reproduction*
 - *women also in (international) law slowly gained status of a free subject after the French Revolution, 1848, the 19th and 20th Century*
- *This process is still uncompleted & under threat of backlash*

The idea 1791

Paras' of „*Les Droits De La Femme*“

Equal shares in economic life– Economic rights of women

- **Article XIII (13)**

The budget for the police and for the expenses of the state administration will be allocated by equal shares from woman and man. *If the woman shares all duties and burdens she must equally participate in the distribution of jobs and work, in lower and in high positions, and in industry.*

...Olympe de Gouges



- **Article XIV (14)**

*The women citizens and the men citizens have the right to define on each necessary public allocations and expenditures, directly through themselves or through their [elected] representatives. **The female citizens can only agree to the principle to pay taxes of the same amount of men from their financial assets if they have a share in the public administration and through this will decide equally upon the use, the allocation and timeframe of taxes.***

- **Article XV (15)**

The female population who is paying the same share of taxes as the male has the right to claim for statements of accounts from all public institutions.



THE EARLY RHETORIC FIGURE OF ADVOCACY FOR PEACE

**“More social spending for health, better work places, child care, education
– Nothing for war”**

- 1914 WW I: Den Haag’s Feminist Peace Conference participants asked for transparent economic analyses & budget information [1]
- They founded a economic commissions & went into budget analysis
- They did not claim for a change of budget process - as we do today
- They called governments to target spending for peaceful objectives: health, education ...

[1] see pre- World War II documents of the International Alliance, US- League of Women’s Voters, their Peace Initiatives in Swartmore College, Library of Congress, Smith College, Atria et al.

1932 Continuation & campaign

- **WILPF & IAW** was well informed activist Rosa Manus (NL) and Dorothea van Velsen (Germany) about the Nazi's objectives to destroy democracy, cancel citizen's rights of Jewish people & women's rights and their war plan
- Chapman Catt, Aletta Jacobs and another in 1928 travelled to Rome to observe speeches from Mussolini and Hitler. ...**CCC**: "This will cost us 40 years progress.."
- **WILPF** produced a small YELLOW STICKER which one could fix like a stamp on one's tax declaration: "THAT PART OF INCOME TAX WHICH IS LEVIED FOR PREPARATION FOR WAR IS PAID ONLY UNDER PROTEST".
- The *Findings of the IAW Economic Commission of the Women's Centennial Congress 1940* stated: "The inequitable distribution of national wealth and national income, and the structures of our social system which prevent us from utilizing, developing and conserving our national resources to the full, tend to perpetuate these conflicts [inequality of women and men]". ...
- "The disabilities which women face today as participants in poor national life result less from legal restrictions—which the women's movement of the past 100 years so valiantly fought to eliminate—than from discrimination arising out of our **failure to control the material forces of the world in which both men and women live and labor.**" - The authors claimed for women's economic rights.

2nd wave of Women's Movement & UN Decade for women call for Funding for Women's Rights (1965- 1995)

- 1976 first budget articles in municipalities for shelters & tsm CEDAW Art 4.1.
- Voluntary Fund for the UN-Decade for Women (**VFDW**) founded at the beginning of the UN Decade for Women (1976–1985), renamed at the end of the decade in United Nations Development Fund for Women, UNIFEM: Today **UN WOMEN**
- 1981 CEDAW went into force: **NMAWs created national budgets for women's gender equality** : -> **max. 0,005% of the total national budget**
- United Nations International Research and Training Institute for the Advancement of Women (**INSTRAW**) funded development of strategies & empowerment trainings for Gender Equality
- NGOs worked with the **POVERTY REDUCTION STRATEGY PAPERS (PRSP)** with partners in developing countries- They, and some women NGOs of OECD states, started to work on gender budget issue. -> **This was first GENDER BUDGETING**
- 1985 US-WILPF “redefining national security from a woman's point of view” [**Human Security**] with focus on needs of woman & children in the national budget
- Final result: Jane Midgley's book “**The Women's Budget**” : publishing pentagon's spending & called for '**economic conversion**', ways to transform military industries into other ventures . It emphasized to fund shelters for survivors of rape, battered women, legal protection of elderly women, displaced homemakers, children, and a new stance for lesbian and gay men.

International legal background & Commitments to implementation of Gender Mainstreaming & Budgeting

2001-> EU Benchmark: 2015

- 1914/1930 Peace Movements idea and rhetoric: Don't finance weapons, make budgets for Health, schools, ...
- 1976-85: UN-Decade for Women: PRSP/EU-sponsored- GB First in African States
- 1979: CEDAW: 0-Tolerance for any form of discrimination on the ground of gender/sex – not even through the budget – Shadow report
Article: 1-16; 5, Art 2d, 3; see Diane Elson (06): Budgeting for Women's Rights. Ed.: *unifem*
see CEDAW reporting from NGOs of Germany and CEDAW recommendations since 2004
- 1995: ► 2000: Peking + 5 and 2005: Peking + 10, Peking+15
- 1999: EU: Treaty of Amsterdam
- 1997: EU-Decision on Gender Mainstreaming
- 2001: EU-Finance Minister Conference by UNIFEM: Benchmark 2015 (failed so far)
- A5-0214/2003 Decision of the European Parliament --> EU COMMs tasks listed!!
- 2005: Council of Europe: Gender Budgeting. Final report of the group of specialists on gender budgeting (EG-S-GB) www.coe.int/equality & DEFINITION: Re-organisation of budget
- 2006: EU – Roadmap to Equality (bis 2010)/ EU GE strategy 2010-2015 (but was lacking funding)
- 2007: CSW: Confirms GM/GB – especially on girls/boys - age as a category
- 2008: CSW Confirms implementation of GB: financing for gender equality- CSW66 2022 as well
- 2008: CCRE/CEMR: European Charta for Gender Equality within the Life Communities by the Council of Communities and regions of Europ and the neighbours
- 2009 Germany 43rd CEDAW session, CO Germany: No 23/24 – After Alternative Report of the Alliance of German Women's Organisations & Fact sheet during the 43. session for the committee; Since 2004 CEDAW asks for the finances o measures and GB!
- 2009/10 PEKING+15:confirmation-strengthening Gender Budgeting implementation !
- Austria fixed GB in the constitution; other governments declared it a state goal (France, Sweden, Portugal) this can be dangerous, since only temporary agreed
- ! 2023 EU Court of Auditors wants GB

2. Take the chance to defend democracy and built a Caring Economy and Society, equal, human rights centered.
Ensure a better future with a modern budgeting & steering tool

GENDER BUDGETING

Shaping budgets to
advance gender equality



genderbudgeting.eu

Gender Budgeting as one path of economic justice & Intersectionality

Who: target groups

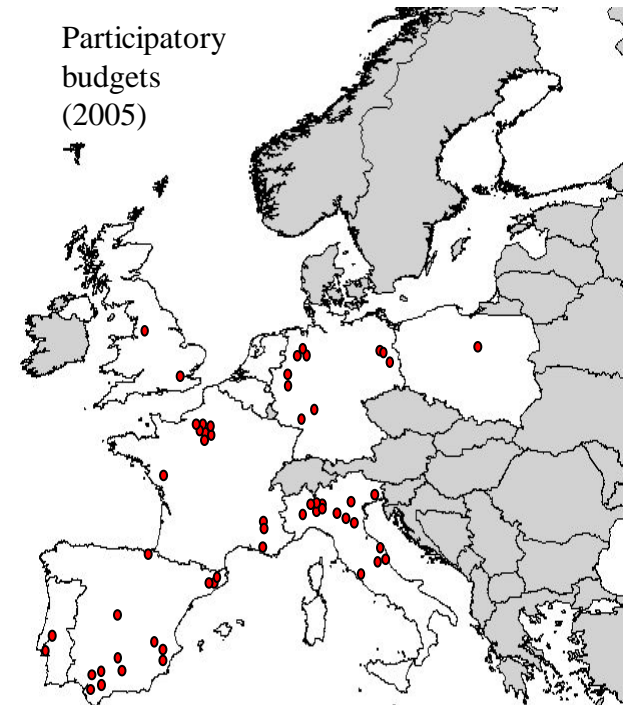
What- objectives & indicators

How & Map it



Qualities to be guaranteed by public institutions budgets & policies

- **PEACE**
- **Gender Equality**
- **Human Rights**
- **Justice** all kind of
-> economical, social, climate...
- Freedom, Self-determination
- Participation
- Representation
- Access to Funds



Quelle: Sintomer/Röcke/Herzberg: Europäische Bürgerhaushalte

EWL Project since 2018 stipulated a new process of GB implementation

- This requested the EU and EU–Commission to assess, plan, monitor and evaluate with a proper methodology all budget expenditure by gender analysis not only 4 R Analysis, but with meaningful indicators, benchmarks, adjustments
- **to steer & accelerate de facto Gender Equality + Human Rights**
- It's Annual Budget, Multi-annual Financial Framework (MFF), the Recovery plan, Green Deal, any plans
- It's budget allocation & GB coherence by member states
- Ensure EU and National tax allocation will have positive effect on Gender Equality: against group rights taxation- for individual taxation
- **EWL provides tool online**



Where else GB needs to be applied – GB in all six EU Institutions & beyond

- GB must be applied in all multilateral institutions (OSCE, NATO,...) in allocation and expenditure beyond
- EP
- EU COMM:
- COE programmes (neighborhood, partners, wide out reach)
- COURT OF AUDITORS: training, representation, evaluation of expertise , invest in modernisation, transparency, participation, digitalisation, human security of finances
- OMBUDSPERSON (wo-men) COE: long ago statement for Human Rights Budgeting – shall be able to take submission on budget inequalities, failing/missing GB
- EU COURT OF JUSTICE: Can it take complains on failing budgets? **AND**
- **FINANCIAL INSTITUTIONS** as World Bank was one of the first with GB expert group
 - End discrimination in all areas of economical and social life ... as Rules and Practices of Banks according to **CEDAW Art 13.b.** “The right to bank loans, mortgages, and other forms of financial credit” **and CEDAW Art 14 (2) e.** and **ART 14 (2) g.** for rural women and all female entrepreneurs
- Trade / Human Rights in Business
- G7 and G20 ficial decision making
- Humanitarian Funds allocation/distribution/ accessibility
- UN Budget and budgets of all entities

3. How the General Methodology and its Adjustments in each Institution

The How

Application of a new Analysis along the Budget Cycle

Plan realistic phases of implementation – Draft an e.g. 3 year plan

1. Make a general **Gender Budget Analyse** of your funds: how much did you spend for women's equality (in total/ % in which areas – what is the portfolio), how is your policy targeting on Gender Equality?
2. Plan to use the **4-R-Gender Analysis**: Representation, Resources, Rights, Realisation
3. Plan for (ex ante & ex post) Gender Impact Assessment to prevent negative impact on Gender Equality (learn to adjust) - see who is affected or concerned by your funding decisions – on short, medium and long term
4. Identify unique focus, objectives & impact you want to achieve
5. Ensure your objectives & outcome will be ambitious

Ensure resources are at stake Identify such resources needed: e.g. for capacity building, consultations, information management, **collection & inclusion of sex aggregated data** in your data bank

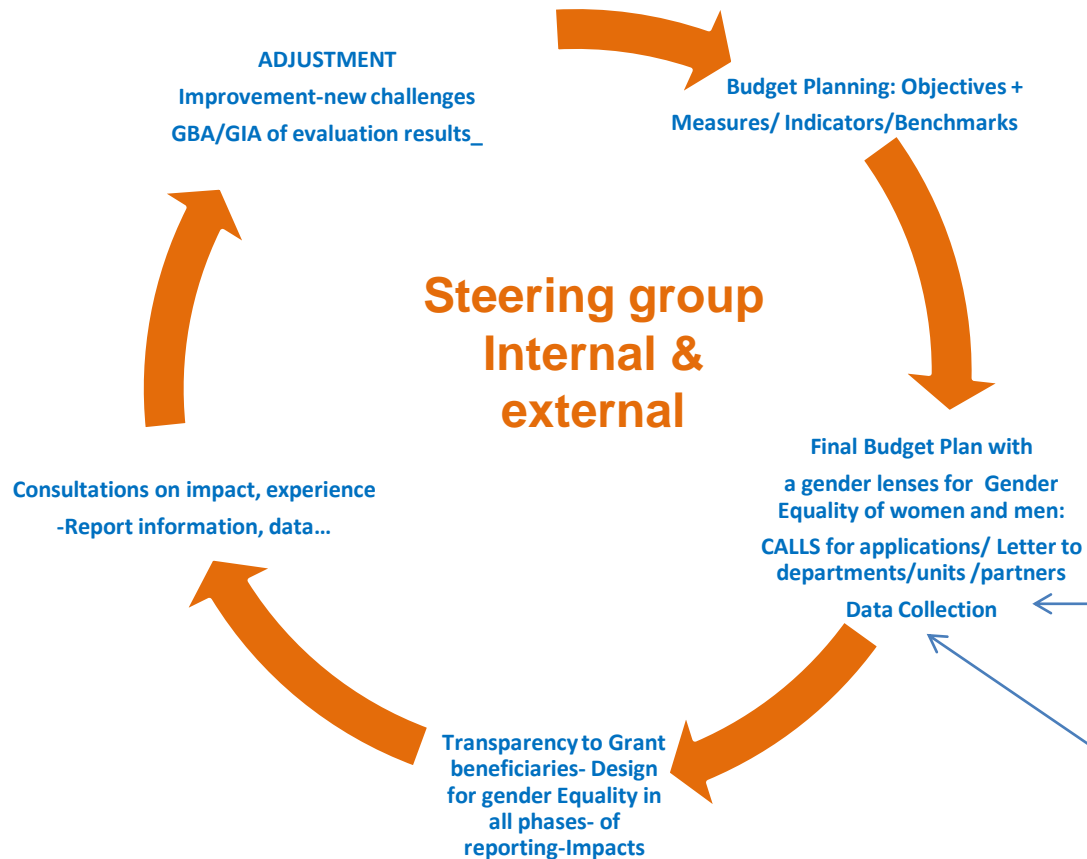
Ensure that the process is lead by stakeholder management

Ensure your management has gender balance or introduce a Gender Equality plan for adjustment → **create accountability**

Make Directive for member states to deliver data & implement GB as a toll of modern good governance, which strengthens democracy

Planning along the budget cycle

Budget debates, statement, speeches shall be once a year on Gender Budgeting



GOAL -overall Gender Equality identify lacks- steer to improve-

Use objectives of Law, Human Rights treaties; organisational /strategic goals

Add & learn by consultation with experts & beneficiaries ***

structure reporting alike

Use consultation in all phases by experts & beneficiaries groups

OBJECTIVES/targets

**other than intersectional Gender Equality in general
break them down by using**

Member States Constitutions

Treaty of Lisbon

European Charta of Human Rights

Istanbul Convention

DIRECTIVE OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL

UN-Human Rights Treaties as

CEDAW, CERD, CESC, CRPD, CMR, CRC, incl. General Recommendations

as catalogues of your objectives

**per each measure, programme budget volume, budget article & according to
the results of the Gender Budget Analysis**

Plan at least to establish de facto Gender Equality throughout

Design Action Plans with benchmarks

Fund and Provide trainings for all stakeholders

Include Women's NGOs and experts in consultations and all phases

DESIGN IT MEASURABLE- TRANSPARENT AND MEANINGFUL

- Per each measure in the budget, a programme, action plan, investment or money flow:
- Define objectives and a set of **quantitative and qualitative INDICATORS** → produce gender data
- **Visualize data by Dept. of statistics & graphics**
- **Include Gender Responsive Early Warning & Response Mechanism/s (GREW)**
- **Have a databank available which will grow with the expansion of the Gender Budgeting and is easy accessible at any time to MEPs, CSO & all stakeholders**
- **Create an GB and GREW - APP-> MEPs, Commissioners, NGOs can use it at any time for their speeches, users might upload information interactive**
 - **ADJUST after review regularly for better outcome**

Monitoring

- Establish a **monitoring body**- decide for monitoring methodology
- Monitor the horizontal integration of Gender Equality & Women's Human Rights in all your funding activities, input/outcome- SYSTEMATICALLY
- Enhance your monitoring process by **external expertise of women experts**
- Publish your monitoring reports- create a monitoring time line matrix which documents success, failure and trends
- Make processes measurable by quantitative and qualitative indicators
- Data collection: modify reporting procedures and requirements by new objectives

At the level of **application** and of **reporting**

Ask for a set of goals, indicators per each project, measure ->

Monitor time rows in a life cycle data

Example: data on share of PARENTAL LEAVE do not offer the later discrimination of a majority of women beneficiaries in their older age who are in poverty and have less pension rights requirements; Similar: share of women in labor forces does not show later pension gap: monitor along whole life cycle and across data sets!

Examples: Shelters, Anti-VAW/protection measures; Care economy; Tec, digitalization, Air & space, science, defense & military/ security investment

NOTE:

- Your beneficiaries have not the same resources for this than you have
- Make reporting of data for beneficiaries easy – prepare it well- fund for it
- Protect them by a **secure system of data protection**- strictly anonymous #WHRD

Evaluation

Evaluate your progress regularly- **Set Stimulus around presentation of the Evaluation for all partners & beneficiaries: Provide a chance to learn**

Evaluate:

- a. Your internal process input/ outcome/ impact for the organisation/ people
- b. Your beneficiaries' process, it's impact on them & in their communities
- c. Identify lacks & gaps and success
- d. Improve, adjust your approaches, methods, data, indicators

Use independent perspective of evaluation.

Have consultations in various for a on the results of the evaluation.

Have exchange and comparison in the philanthropic community on results

Keep small and easy to access and handle grant slots open for new issues and groups of beneficiaries

Strengthen the community's funding for gender quality / women's human rights by mutual concentration of funding topics/areas if adequate