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Gender budgeting: a structural approach to integrating gender equality or a tool to reinforce capacities?

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Abstract

In Belgium, gender mainstreaming and gender budgeting benefit from a strong legal framework. At federal level, gender budgeting is enshrined in the Gender Mainstreaming Law. In communities and regions this is also the case except in Flanders that has adopted a general framework act on equality.

Within the ESIFs, gender is mainstreamed as a horizontal principle in all programming documents. The ESF managing authorities of Flanders and Wallonia have been developing awareness raising and capacity building activities (guidelines, manual, checklists, coaching and training) for years. The integration of gender as a transversal dimension is also visible in the documents relating to calls and the selection process through questions on how the horizontal principle of gender will be/has been taken into account. During this programming period, Wallonia has started to work on gender budgeting, by encouraging promoters to undertake a gender budgeting analysis. In Flanders, gender budgeting is not currently on the agenda.

The approach to gender mainstreaming and gender budgeting in policies and the ESIFs can therefore be seen as structural. However, currently, the process serves more to raise awareness and reinforce the capacity of actors (civil servants and project promoters) to perform a gender analysis and integrate a gender dimension into their actions.

1. Gender mainstreaming and gender budgeting: main aspects

1.1 Legal context at federal level¹

The gender mainstreaming approach started to be implemented at federal level through the adoption of the **federal law of 12 January 2007** that aims at the structural integration of the gender dimension into all federal policies. The key priority of the law is to oblige ministers and their administrations to define a limited number of objectives and develop a strategy (with several instruments) in order to correct and avoid

¹ The situation at Federal level is presented as it serves as a model for other communities and regions.

inequalities between women and men in federal public policies. One of these instruments is a “gender budgeting” procedure implying that each draft of the general budget must be accompanied by a note showing each department’s financial contribution to actions supporting gender equality.

A gender mainstreaming act has been adopted in all regions and communities except for Flanders. They contain similar features to the federal act regarding both gender mainstreaming and gender budgeting.

Gender budgeting requirements at federal level have been clarified in an administrative instrument (the circular of 29 April 2010) to all federal departments and institutions concerned by the implementation of the law, and should be applied from 2011 onwards. The Gender Institute has also prepared manuals to support the concrete integration of gender into policies: gender in public procurement (2007), gender mainstreaming (2009) and gender budgeting (2011).

Finally, it is important to note that under the gender mainstreaming laws, a report on the implementation of gender mainstreaming is presented by the respective government at mid-term and at the end of each legislative period.²

Gender budgeting is enshrined in the gender mainstreaming strategy. Both are an acknowledgement of the transversal nature of the gender dimension and its integration by all those involved at the various stages of development and implementation of the policies.

1.2 Steps of gender budgeting

The integration of the gender perspective into all public policies implies that it is also integrated in the budgetary domain – this is what gender budgeting is about. The Gender Institute used the definition provided by the Council of Europe: “It means a gender-based assessment of budgets, incorporating a gender perspective at all levels of the budgetary process and restructuring revenues and expenditures in order to promote gender equality.”³ In this paper, it is the federal gender budgeting technique that is presented, as it served as an example to other bodies.

A specific circular relating to gender budgeting was adopted on 29 April 2010. It explains how to apply gender budgeting as from 2010, with a description of the main concepts, of the procedure to be followed, and of the method to be used (see in annexe 2 a brief summary of the procedure to be followed).

What are the steps of gender budgeting?

First, credits are divided into three broad categories:

² The most recent report available at federal level (in French and Dutch) can be found at https://igvm-iefh.belgium.be/sites/default/files/downloads/gm_-_rapport_de_fin_de_legislature_-_final.pdf

³ Council of Europe, The incorporation of gender perspective in the budgetary process: Final report of the group of specialists on incorporation of gender perspective in the budgetary process (EG-S-GB). Strasbourg, EG-S-GB (2004) RAP AN, 2005.

1. credits relating to dossiers which concern internal functioning or which do not contain a gender perspective;
2. credits relating to actions aimed at achieving equality between men and women;
3. credits relating to dossiers which concern a public policy and which contain a gender perspective, i.e. which can have an impact on the respective situation of women and men in society.

If the credits requested pertain to category 3, the dossier managers have to broaden their reflection in order to be able to explain briefly in a 'gender comment' the manner in which the gender perspective has been or will be taken into account within the framework of the dossier in question. If the credits requested relate to category 2, the manager has to write a gender note according to the model provided by the Gender Institute.

1.3 Gender mainstreaming and gender budgeting within ESIF/ESF programme

There is no ESF programme at federal level. However, as indicated before, all communities and regions have a legal framework ensuring the principle of equality and non-discrimination in all policies. The principle of gender budgeting is also recognised by regional/community acts (*décrets*) in Wallonia and Brussels Region which are receiving ESIF funds. However, an important driver to implement Gender Equality in ESIF programmes as a transversal dimension is the European Regulations and in particular Article 7 of the ESF Regulation.⁴ In the partnership agreement the horizontal integration of the gender dimension is stated and the different entities present their method of integrating gender equality.

The approaches of the country's two main ESF agencies (Flanders and Wallonia) are presented below as examples of the approach followed in the ESIFs. Indeed, previous programmes in these regions have included actions to implementing a gender mainstreaming approach. For example, these two managing authorities were part of the Gender Mainstreaming Community of Practice (COP),⁵ an ESF transnational network running during the previous programming period (2013-2017), which developed a number of tools to support gender mainstreaming in the ESF at all levels (from EU programming to project implementation).

In the Walloon region, the legal framework of the gender mainstreaming approach and gender budgeting is the regional act (*décret*) of 11 April 2014 as amended by the act of 3 March 2016. Currently, in **ESF in Wallonia**,⁶ the promoter has to indicate, in the project application, the potential effects of the project on gender equality and indicate how the project will contribute to the horizontal objectives of the Commission

⁴ Regulation No 1304/2013 of the European Parliament and of the Council of 17 December 2013 on the European Social Fund and repealing Council Regulation (EC) No 1081/2006

⁵ <http://standard.gendercop.com/index.html>

⁶ See at www.fse.be

(one being gender equality). During the selection process, each project is also examined with regard to its positive contribution to transversal policies. A number of tools and guidance notes are provided to potential and actual project promoters on gender during the project cycle. A self-assessment tool is available and capacity building activities on gender are promoted.

While not compulsory, a gender budgeting approach is part of the current programming period (2014-2020). The approach is similar to the one adopted at federal level: categorising the budget allocations, analysing the use of credits classified as gender relevant and the choice of priorities. To do so the ESF Agency recommends starting work on those actions that have the greatest potential impact according to the means available (a type of cost-benefit analysis).

Gender budgeting is part of a gender mainstreaming approach. In the checklist relating to that aspect, two items relating to gender budgeting are indicated:

- Reserve a part of the budget for the implementation of gender mainstreaming activities;
- Assess the whole budget for its effect on women and men using the factsheet on gender budgeting for ESF projects (see above).

In Flanders, as indicated above, the integration of gender is not new either. The focus is on gender mainstreaming, although there is no mention of gender budgeting. The website contains a number of information items, videos and examples of concrete projects to serve as inspiration.⁷ Capacity building and awareness raising activities are organised to support project promoters. Gender is also taken into account at different stages of the programming process:

- Within the team, there are exchanges as to what gender means concretely to ensure that there is enough capacity and willingness to implement it;
- A database with information on gender analysis per theme and investment priority is available;
- This gender analysis is included in the terms of reference (fiche) of the call for projects and in expectations from project promoters;
- A database with testimonies, good practices, storytelling of promoters and testimonials by the final target group is available;
- Gender is integrated structurally in all communication, both by using gender sensitive language and by paying attention to gender at all stages;
- Parallel to gender mainstreaming, a specific approach is also implemented: activities are organised during the ‘gender months’ (March and November). Gender is highlighted regularly in the newsletter. Gender ambassadors are

⁷ See at <https://www.esf-vlaanderen.be/nl/mv-united>

chosen from among the promoters. A gender helpdesk is also available for project promoters.

However, it should be noted that there is no Gender Mainstreaming Act in Flanders and so the legal reference is the obligation contained in the regional act (decreet) of 10 July 2008, which provides a framework for equality.

2. Policy debate in Belgium

There is currently limited debate in Belgium about gender mainstreaming and gender budgeting. However, institutions/offices in charge of gender equality in the various entities of the country exchange information on how to be more effective. The goal is to inform each other on the tools they use and ways to support the implementation of gender mainstreaming and gender budgeting. Some of the difficulties highlighted in that context relate to:

- The difficulty of making the results of gender mainstreaming visible;
- The difficulty of showing the differences between women and men in the analysis without reinforcing gender stereotypes;
- The limited resources available for gender mainstreaming and gender budgeting (human resources, budget etc.) combined with unrealistic expectations deriving from the absence of priorities;
- The unavailability of sanctions when legal obligations are not fulfilled. The Gender Institute monitors implementation and plays the role of coach/adviser to support the process. There are no sanctions and the public service in charge of the budget does not refuse a proposed budget if the classification is not done (e.g. category 0, see infra);
- The expertise and capacity of actors to apply gender mainstreaming;
- The correct and efficient use of the various instruments (e.g. gender test, gender budgeting).

On this last point, what stands out from the evaluation of the gender budgeting strategy at federal level is the difficulty dossier managers have in applying the budget classification correctly. It shows a clear tendency to classify a majority of budget allocations under category 1 instead of 3 – or even, in some ministries, not to categorise them at all. To register this fact, the public service in charge of the budget allocated a category 0 to unclassified budget allocations.

This tendency to classify allocations in category 1 (not gender relevant) emerges clearly in other entities as well. This can be explained by the lack of understanding of what gender is about. In this case, coaching and support can partly solve the issue. A second possible explanation is the fear of additional work being needed when category 3 is chosen. This is also what is observed in the performance of the gender test. Here, a solution could be to fix priorities, and in this respect some elements of

the practices presented may be interesting – in particular those in the Austrian approach (see section 3).

Within the ESF, the debate is on how to ensure that gender mainstreaming is really implemented in ESIF actions. A combination of a gender mainstreaming approach and specific action is necessary. For example, programmes should ensure that gender is mainstreamed within the employability strand but also plan specific actions to tackle gender stereotypes, vertical and horizontal work segregation. It also appears, at least at European level, that funding for gender equality decreases when it is only considered as a transversal/horizontal dimension. Specific objectives should be agreed and monitored using some key qualitative and quantitative indicators. This will help to make progress visible and to see where action is needed. Gender budgeting can be a powerful instrument to force actors (managing authorities and promoters) to identify resources allocated to gender equality. Through its analysis of the budget, it can support the necessity to implement specific equality measures.

3. Transferability aspects

As mentioned above, the approach in Belgium regarding ESIF and in particular ESF funds is different from that in the Czech Republic and in Slovakia. Here, the focus is on gender mainstreaming and on having gender integrated as a horizontal principle. There are no specific calls regarding gender. However, in terms of projects, some are indeed working on stereotypes, care services and desegregation in the labour market.

Austria's approach is interesting as it combines the gender mainstreaming approach adopted in Belgium to gender budgeting. Each minister fixes some concrete objective to work on during her/his legislative term and the ministry analyses the funds dedicated to relevant priorities. Strengthening the link between the gender equality objective and budgetary resources is certainly necessary. The idea of coupling the implementation of gender budgeting with a major budget reform would be a powerful drive for a more structural change.

One aspect that transpires from all discussion papers is the issue of knowledge and capacity across public institutions to apply gender mainstreaming. Without appropriate knowledge, capacity and willingness, a gender dimension will not be implemented.

Training and other capacity building activities have taken place in Belgium (both in the public administration and within the ESF) for around 10 years now. It is utopian to think that people can (and want to) become gender experts. Getting gender expertise on board is certainly necessary and is generally underestimated and underbudgeted in both ESF and public administration management. One solution is, as in Belgium, to have an independent body that plays that role. However, this requires more human resources and funds than are currently made available.

The role of sanctions was not raised in the discussion papers and this is probably also a key issue. However, the difficulty is to avoid only lip service being paid, or to focus only on the process (e.g. correct classification) instead of concrete results. This

tension can perhaps be resolved through the choice of a limited number of objectives, with realistic planned results carefully monitored and evaluated.

4. Conclusions and recommendations

Gender budgeting, like gender mainstreaming, is a powerful instrument for structural change if well implemented. It is strongly justified as it contributes to greater transparency and better governance. However, to do it properly for all policies is not possible. Unless it is seen merely as an instrument to raise awareness, it should focus on a limited number of priorities. Otherwise, it is perceived as a formality, giving extra work to civil servants and other actors (e.g. promoters) without creating any added value.

Today, in Belgium, gender mainstreaming and gender budgeting work relies on a few motivated and expert people. If gender equality is a core value of Europe, it should be given more weight and better recognition. Gender expertise and its importance should be recognised and valorised by our governmental and administrative systems. The implementation of gender equality could be part of the managerial assessment systems.

Within the ESF/ESIFs, the possibility of allocating specific funds for gender equality has been discussed in the past. It could also be that projects are awarded more funds if they integrate gender (reward instead of sanction).

Annex 1 – Policy and Institutional context of Gender Mainstreaming

Belgium's commitment to the **gender mainstreaming** approach is not new and derives from the engagement adopted by the state and the European Union during the UN conference in Beijing in 1995. On 6 March 1996, the Belgian Parliament adopted a law that provides that the federal government shall submit yearly to the parliament a report (known as the "Beijing Report") concerning the policies implemented to reach the gender equality objectives agreed in Beijing. It is the first law in Belgium to recognise the transversal character of the gender dimension. Subsequently a number of actions were implemented, in particular a pilot project from 2000 to 2002 to support the various ministerial departments in defining a strategy regarding the promotion of equality between women and men. Already at that time, some actions relating to gender budgeting were tested. The limited nature of the content and the repercussions of the law of 6 March 1996 led Belgium to enact a new law on gender mainstreaming on 12 January 2007.

This first engagement and implementation of a gender mainstreaming approach in 1996 preceded the creation of the **Institute for the Equality of Women and Men** (hereafter "Gender Institute"). The Gender Institute, created in 2002, has the mission to guarantee and promote the equality of women and men and to fight against any form of discrimination and inequality based on gender in all aspects of life, through the development and implementation of a suitable legal framework and appropriate structures, strategies, instruments and actions based on a gender mainstreaming approach.

While this institute is only competent for federal matters⁸, it plays a crucial leading role in gender equality policies in Belgium: a number of acts and procedures (such as for gender budgeting as explained below) adopted by federated authorities (Communities and Regions) are largely inspired by federal legislation and actions.

Annex 2: gender budgeting

As explained in the manual prepared by the Gender Institute, gender budgeting is:

- A strategy introducing the principle of taking the gender perspective into account in policies, measures and actions of the public authorities via an analysis of the budget, thereby increasing their effectiveness;
- An approach having as its final objective to strengthen equality between women and men, as well as to optimise the economy, effectiveness, efficiency and equity of public finances;

⁸ Although it has signed protocol agreement with some communities and regions.

- An instrument for achieving a situation in public finances (tax revenues and expenditures) that takes into account the needs and expectations of individuals (women and men).

Diagram of the process relating to *gender budgeting*

