

THE GENDER BUDGETING REPORT OF THE EUROPEAN PARLIAMENT

A PRELIMINARY STUDY

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LIST OF ABBREVIATIONS

EIGE	European Institute for Gender Equality
EP	European Parliament
EU	European Union
F/M	Female/Male
GB	Gender Budgeting
GE	Gender Equality
MEPs	Members of Parliament

FOREWORD

We are convinced that the European Parliament should be a role model institution for gender equality. The EP democratically represents the EU citizens, and this democratic responsibility includes accountability. We can honour this accountability and gender equality by creating transparency on the gender-effects of our budgets, especially our own budget of Parliament.

We aspire for the Parliament to lead by example and be a forerunner in the gender budgeting, and inspire other Parliaments and institutions. We have therefore commissioned a study to show how Gender Budgeting can be conducted in the context of the Parliament. In addition, we have called for Gender Budgeting to become a regular exercise in Parliament in the years ahead within the resolution accompanying the Parliamentary budget (to be voted on 29th April 2021). We hope this marks the beginning of change for our institution, ensuring that next year's budget will be presented with a special annex on Gender Budgeting by the Secretary General.

This study unveils that, while there is some work being done already, there is room for improvement for policy measures to reach gender equality in the various aspects of the functioning of the Parliament. It also demonstrates that Gender Budgeting is an excellent tool to trigger the necessary decisions towards ensuring real improvement.

The evaluation of the impacts of our financial decisions can challenge politics and ideas. The reflection on our actions, especially in the realm of gender equality, is the pre-condition for change.

Brussels, 26th April 2021

Alexandra Geese and Damian Boeselager

EXECUTIVE SUMMARY

Gender Budgeting (GB) aims at evaluating the impact of an Institution's budget on men and women, with a gender mainstreaming approach applied to every field of intervention. This kind of analysis, implemented so far by 41% of OECD countries, is, since 2003, part of the **EU commitment to achieve Gender Equality** by recommending the Member States to develop GB projects.

Since 2015, two feasibility studies have been implemented to develop a gender analysis of the EU Budget. In addition to them, this exploratory Gender Budgeting Report of the European Parliament outlines a specific methodology that fits the EP within the general framework and offers a preliminary analysis of the available gender data. The study makes detailed recommendations for developing a full Gender Budgeting Report to support innovative policies and strategies that may expand the **EP Social Sustainability from a gender perspective**.

The EP budget is a small part of the whole EU budget and consists of about 2 billion euros in expenditures covering EP operating costs like salaries and cost of offices. Since the EP budget is an administrative budget, its gender impact may be identified in term of **"inputs"**, i.e. the expenditures for people working for the Institution both directly and indirectly. The outputs resulting from the EP expenditures may be then identified in the EP laws and regulatory norms, and only the final outcomes of the EP legislative power concern the gender impact on EU citizens. The GB Report of the EP, therefore, is focused mainly on the analysis of the gender impact of the EP expenditures in terms of inputs while offering some insight into the outputs and the outcomes as a springboard for future developments.

The EP expenditures have been analysed taking into consideration their gender impact on **three main groups of stakeholders**: MEPs, Staff (internal stakeholders) and Experts and Workers of service providers (external stakeholders).

The gender impact of the EP budget on these stakeholders can be evaluated according to three **reclassification priorities**: 1) internal stakeholders who receive resources directly (1st order), 2) internal stakeholders who receive services (2nd order) 3) external stakeholders who provide general services (3rd order). The analysis of the EP budget also takes into consideration **human capabilities** enabled by the expenditures (eg: Exercise of Political Power, Work, Mobility and Travel, Access to communication, to information ecc).

In the EP budget, most expenditures are statutory (employment contracts, multi-annual services, essential services etc.), and their amount cannot be changed in a short time. In this case a gender perspective needs to be developed from a **GB qualitative point of view** which investigates on procedures and rules governing expenditures.

The main results of the GB of the EP and the recommendations concerning the three main categories of stakeholders involved are:

MEPs: currently the EP is composed by 705 MEPs elected by the citizens of the EU countries, of which 39,5% are women and 60,5% are men. Assuming that their per capita expenditures are equal, it is possible to roughly estimate that, since the expenditures for Members of the Institution are about 207 million euros, the EP spends about 82 million euros for women and 125 million euros for men (EP Budget 2021). This imbalance cannot be fixed by the EP, depending on the results of the European elections and on the number of women running in each country, but it further highlights the lack of women's democratic representation, since they represent over half of the EU population.

To rectify the situation, the EP may decide to adopt a gender impact strategy aimed at 1) promoting the political empowerment of women among MEPs and 2) increasing the number of women among future MEPs. The first goal can be achieved by increasing the number of women in leadership positions in the EP, by offering specific training opportunities on gender issues like leadership, team building, and negotiating skills and by investigating conscious and unconscious gender bias that may influence MEPs political commitment. The second goal can be achieved by promoting projects to raise awareness on the lack of women's political representation in the EU countries with the lowest rate of women among MEPs.

Staff: 55,5% of the EP Staff are women. Such gender balance is favoured by specific gender equality recruitment rules adopted by all the EU Institutions. While the overall number of people in the EP is well balanced, a gender issue concerning leadership roles and career advancement still persists: women are 15% of Deputy Secretary-General and Directors-General and 39% of Directors and Head of Unit (2018). A more in-depth analysis is also needed to better investigate the domestic and care work load of women, who represent 75% of part-time workers, 70,4% of those taking advantage of Parental leaves and 79,5% of the beneficiaries of Family leaves (2018). Also strategies for staff replacement need further investigation.

Research on gender stereotypes, focus groups, interviews, training initiative for leadership roles are all useful tools that may be adopted to comply with the goal of gender balance in the decision making process.

Experts and employees of service providers: the available data and indicators show that the EP strives for a gender balance in the selection of experts, where possible; however, it is important to underline that the persistence of a strong horizontal segregation in some sectors makes harder to hire women: women represent 75% of all the external interpreters, 35% of experts invited to Committee hearings for External Policies (2018-2020) and 11% of ICT specialists working for compa-

nies accredited to access EP buildings. Another specific gender issue also concerns the possibility of internalizing cleaning and catering services – highly feminized sectors - to gender-balance similar process already happened in the past years for ICT, driving and security services, which mainly benefited men.

As for the companies working with the European Parliament, they need to comply to the procurement directives. EP tenders already include a general commitment to promote equality and diversity, with specific attention to equality between men and women. Thus, it is recommended to adopt specific gender procurement rules rewarding more gender sensitive service providers.

What is Gender Budgeting: Gender Budgeting (GB) is a tool to implement the gender mainstreaming strategy in the context of public resources. It aims at achieving gender equality, seeks the adoption of a gender perspective in the efficiency and effectiveness of institutions' policies, pursues transparency in the allocation and redistribution of public resources, supports a gender mainstreaming perspective in the stakeholders' involvement and in the development of human capabilities. The gender budgeting methodology includes steps like context analysis, planning analysis, budget reclassification, and activities' implementation and evaluation.

GB takes into consideration the gender impact of all revenues, expenditures and of specific policies, reaching its full potential when developed as a process applied to every phase of the institutions' performance cycle (planning-budgeting-implementing-auditing-evaluating).

The history of GB worldwide: GB was first implemented in Australia in the mid-1980s. In 1995 it was recommended by the Beijing platform for Action of the 4th World Conference on Women as a technical tool that public institutions should adopt to implement gender mainstreaming within their gender equality strategy. According to the FMI, several countries in the world (84) and 41% of OECD countries have developed GB initiatives at the national level. Since 1995 numerous other GB initiatives have been implemented at the local level by Regions, Local Authorities, Municipalities, Universities, and NGOs.

The history of GB in the European Union: The European Union, whose institutional identity is strongly committed to Gender Equality and Gender Mainstreaming (e.g Arts. 2 and 3 of the TEU, Art. 8 of the TFEU and Art. 23 of the EU Charter of Fundamental Rights) has mentioned GB principles since 1996. In 2003, a specific Resolution on Gender budgeting was approved and several other resolutions recommend the adoption of gender budgeting in areas such as climate justice, poverty, digital age, and economic crisis. In 2015 a first feasibility study experimenting the Capability approach to the “EU Budget for gender Equality” was implemented, and later updated in 2019.

The GB analysis of the European Parliament (EP) is therefore part of a multi-annual EU commitment to this issue. As for the specific EP budget, the EP Resolution on “Gender mainstreaming in the European Parliament” approved in January 2019 “*urges Parliament's responsible bodies to incorporate the gender perspective and use gender indicators when drafting and adopting Parliament's estimates, and throughout the discharge process*”.

INTRODUCTION

In the framework of the European Union (EU) **Gender Equality** (GE) is a core principle defined by Article 2 and Article 3 of the Treaty on European Union.

Since its foundation, the EU has actively promoted GE at the Member States level: the commitment to promote GE into the EU and Member states' body of law dates back to 1957 with the "Equal pay for equal work" principle introduced in European Treaties. Over the years the EU has enacted additional important **legislation** such as the principle of equal treatment for men and women in matters of social security, the equal opportunities and equal treatment of men and women in matters of employment and occupation, the safety and health at work of pregnant workers, parental leaves, the equal treatment between men and women in the access to and supply of goods and services, the fight against violence against women and the human trafficking.

Besides legislation, most of which was adopted by the ordinary legislative procedure by the Member states, the EU has also funded actions to promote GE both with specific initiatives and within the framework of the main EU Funds.

The European Parliament (EP) has played an active part in this process, by approving EU laws and budgets, but also by contributing to the EU development of GE policies through its own-initiatives and by drawing the attention of other institutions to specific gender issues.

Although in the EU area, in the last decades, women's status in society has improved, and higher levels of GE have been achieved, the **European gender gap**, according to the Gender Equality Index by EIGE (EIGE, 2020a), is still at 67,9%. In addition, this result, which still is far from full GE, is threatened by the consequences of the **pandemic**, since this health, social and economic crisis is hitting women more than men in terms of higher job losses, of an increased workload at home for unpaid domestic and care work, and of a higher risk of domestic violence.

The EU has recently tackled this "**she-cession**" crisis by introducing GE as an evaluation criteria for the National Plans that the EU Member States are due to present to the Commission to access the Recovery and Resilience Fund. Despite such a commitment, that the Greens/EFA have strongly

supported, the risk of widening gender inequalities has increased because of the EU decision to invest most of the Nextgeneration EU funds in economic sectors characterized by a relevant percentage of male workers. The Greens/EFA are playing an active role in the public and political debate on how the European Union has to take action to support GE as a core strategy to overcome this crisis, not only by calling for a more equal access to the Nextgeneration Funds for men and women, with the “Half of it” Campaign, but also by asking to the EU to commit to implement its institutional action in favour of GE.

In this perspective, the Greens/EFA are dedicated to supporting **Gender Budgeting** (GB) initiatives to increase the EP commitment to implement its GE action both at the political and at the administrative level.

GB is a powerful tool to assess the different impact of public resources on women and men, and to encourage the EP and other European Institutions to take gender sensitive decisions.

Following the Beijing Platform for Action (UNWOMEN, 1995), the EU has supported the GB methodology since 1996, mainly by recommending its adoption to the Member States and by promoting GB initiatives. Starting from 2015, the EU has approached the implementation of a gender impact analysis of its own budget with initial feasibility studies on the EU budget.

Considering that women’s participation to the economic growth and the availability of funds for recovery are two key elements that will help in overcoming the pandemic crisis, GB, since it deals with gender impact and funds, is, without a doubt, an important tool for a successful EU strategy.

In this perspective, the Greens/EFA have decided to actively promote the implementation of GB initiatives in the EU institutions at any level, as a matter of coherence and credibility towards the Member States, but also with the awareness of the EU budget’s central role in the European recovery.

To support the political engagement with a real and proactive action, the Greens/EFA have therefore commissioned this **preliminary study** to outline the feasibility of a GB approach to the administrative budget of the European Parliament.

The hope is that this first study of the available data and of the possible areas of analysis may stimulate the EP administration to engage in a full and thorough GB analysis, and also to encourage other EU institutions to pursue an overall GB approach.

WHAT IS GENDER BUDGETING?

Gender Equality is a human right recognized in every democracy. Although it has been formally accomplished, its achievement is largely unsatisfactory and inadequate, both worldwide and within the EU.

The goal of actual gender equality is still far to reach and, above all, a significant amount of work still needs to be done to change not only the social culture but also decision-making processes, rules, laws, regulations and power relationships. New perspectives and technical tools are therefore necessary in order to include the vision of GE in the society, economy and political systems.

In 1995, within the framework of its 4th World Conference, the United Nations have identified “Gender Mainstreaming” and “Women’s Empowerment” as the most effective political strategies to support GE at the global level (Beijing Platform for Action, UNWOMEN, 1995).

While women’s empowerment is an intuitive concept, **gender mainstreaming** is a revolutionary perspective to adopt, since it investigates under the gender point of view every aspect of policies, society and economy. According to the EIGE definition, gender mainstreaming is “... *The systematic consideration of the differences between the conditions, situations and needs of women and men in all Community policies and actions. Gender mainstreaming is 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 all stages, by the actors normally involved in policy-making. Mainstreaming a gender perspective is the process of assessing the implications for women and men of any planned action, including legislation, policies or programs, in all areas and at all levels. It is a way to make women’s as well as men’s concerns and experiences an integral dimension of the design, implementation, monitoring and evaluation of policies and programs in all political, economic and societal spheres so that women and men benefit equally and inequality is not perpetuated. The ultimate goal is to achieve gender equality...*” (EIGE, 2020b).

Among the many tools that have been utilized at the international, national and local level to develop gender mainstreaming, GB has proven to be one of the most powerful agents of change. According to the definition of the Council of Europe “...**Gender budgeting** is an application of gender mainstreaming in the budgetary process. 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..." (Council of Europe, 2005).

GB, therefore, adopts a monetary and financial approach to achieve GE. This perspective is important to the extent that it evaluates the role of money on gender issues and the potential it may hold to overcome them. Economic and financial decisions concerning how budgets are structured, are not neutral, since they affect differently women and men because of their gender and because of their different status in society.

Whereas the financial perspective offers new suggestions to make different choices, one must keep in mind, however, that GB initiatives have to be always implemented in line with gender mainstreaming objectives, meaning that the analysis does not have to be limited to: *"... budgetary allocations targeting equal opportunity policies or promoting women, but encompasses the entire budget, revenues as well as expenditures.. Gender Budgeting does not mean a separate budget for women... If gender mainstreaming is to be implemented in practice, then **budgets must be examined together with policy**. If the gap between policy and resource allocation, which has been detected in almost all gender budget initiatives to date, is to be filled, the budget-making and policy-making must be carried out in close collaboration. Gender Budgeting, therefore, is not limited to particular policy areas, but all policy fields should be in principle the subject of Gender Budgeting. In practice, however, Gender Budgeting initiatives might start by limiting their scope to specific policy areas or measures in order to develop appropriate models and tools and to gain experience and expertise for large scale approaches..."* (Council of Europe, 2005, pp. 10-11).

This first **objective** of awareness highlights the lack of neutrality of budgets and it also reveals the actual political will to overcome gender inequalities: budget decisions, in the end, show the real intentions behind political statements. GB, furthermore, allows to restructure an organization's performance cycle in accordance to equality values, detecting possible areas and phases of the process for change: it seeks GE not only with regard to the amount of financial resources spent, but also to the process and procedures adopted to spend them. In addition, since it translates into a cyclic approach, GB aims at developing an adequate level of awareness of short, medium and long-term GE objectives that will lead to the best possible outcome.

Besides possible decisions to shift money within the budget to achieve GE, it is also important, therefore, to pay attention on how statutory expenditures may be better spent with respect to GE issues. According to the main theories, GB also pursues some specific objectives that may be summarised in:

1. promoting **equity, efficiency and effectiveness** (the 3 Es) in the planning and implementation of institutions' policies (Sharp R., 2003);
2. promoting **transparency** in the allocation and redistribution of public resources (Sharp R., 2003);
3. increasing **awareness** through communication activities and stakeholders' involvement (Sharp R., 2003);
4. increasing the development of **human capabilities** from an equality perspective.

The first initiative of GB was conducted in the mid-1980s by the Australian Government. Since then, other Gender Responsive Budgeting initiatives have spread mainly within the Commonwealth countries: United Kingdom in 1989, Canada in 1993, South Africa in 1996 (ILO, 2006).

The important mention of GB in the Beijing Platform for Action in 1995 (UNWOMEN, 1995) supported numerous experimentations and institutional recognition which encouraged in the following years the implementation of many other initiatives at international, national and local level.

In 1996 the Commonwealth Secretariat launched a pilot project of government-led GB initiatives in Barbados, South Africa, Sri Lanka, and St Kitts and Nevis, then the United Nations Development Fund for Women (UNIFEM) and the International Development Research Centre (IDRC) jointly implemented the global Gender-responsive Budget Initiatives Programme.

The Gender Budgeting Indicator of the International Monetary Fund (FMI, 2015), last updated in 2015, refers to 84 countries having developed GB Initiatives at national level, while, according to the 2016 OECD Survey of Gender Budgeting Practices, 41% of OECD countries have introduced GB initiatives (Downes et al., 2017).

Up to date there have been many different initiatives of GB in the world, applied to the budgets of national and subnational governments, regional and local governments, Institutions, development-oriented agencies, NGOs, national and international feminist movements, Academia and Research Centres.

THE GENDER IDENTITY OF THE EUROPEAN PARLIAMENT

The EP has a small administrative budget, compared to the overall budget of the EU, but it is important to develop an independent GB initiative to give evidence to a specific gender identity that arises from its institutional role.

The European Parliament is in fact one of the European Union institutions and is the EU's law-making body. It is the only EU institution directly elected every 5 years by the EU voters and it plays three main **roles: Legislative, Supervisory and Budgetary**. It was first established in 1952 as the Common Assembly of the European Coal and Steel Community and in 1962 became the European Parliament; the first direct elections took place in 1979. Currently the EP has three places of work: Strasbourg (France), Brussels (Belgium) and Luxembourg.

The **activity** of the EP is structured on a double level: the 20 Committees and 2 subcommittees, that are responsible for preparing legislation, and the Plenary sessions, where legislation is finally voted on. Those who participate to the EP activity are: 705 elected Members of the Parliament, 10.053 people, among officials, temporary staff and other staff, of which 6.748 work at the Secretariat, 1.103 in the political groups, and 2.202 Accredited Parliamentary Assistants (European Parliament, 2018a).

The EP, as part of the EU, has a strong commitment to implement a specific **gender identity** both at the political level and at the administrative level; this commitment is included in EU Treaties since its foundation, with a specific attention to equal opportunities and to the rights of women's workers in the labour market in the 70s and later, as the EU competences and functions expanded, with the adoption of a gender mainstreaming approach following the EU full adoption, in 1995, of the Beijing Platform of action strategies.

Gender mainstreaming is adopted as a cross cutting issue in every EP field of action thanks to Rule 239 of the EP Rules of procedure (European Parliament, 2020a):

“Rule 239: The Bureau shall adopt a gender action plan aimed at incorporating a gender perspective in all Parliament's activities, at all levels and all stages. The gender action plan shall be monitored

bi-annually and reviewed at least every five years...”

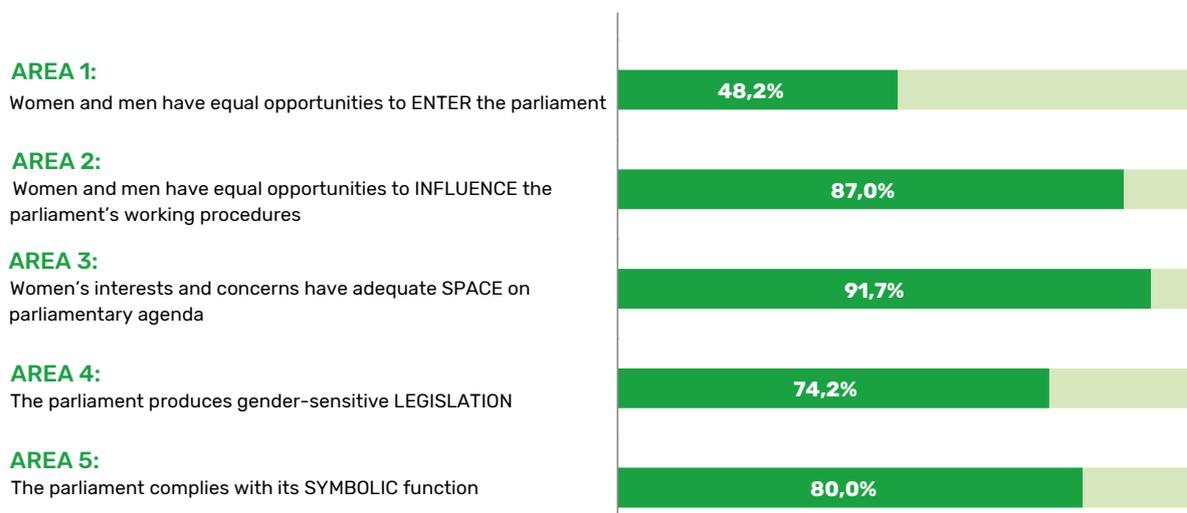
At the political level, the EP ensures the promotion of a gender mainstreaming strategy within its Committees thanks to a Committee on Women’s rights and Gender Equality (FEMM) and to specific Action Plans adopted by each Committee.

At the Administrative level, the EP commitment to Gender equality through the gender mainstreaming strategy may rely on the EP gender equality structures like:

- Equality, Inclusion and Diversity Unit (EIDU).
- Equality and Diversity Coordinators.
- Committee on Equal Opportunities and Diversity (COPEC).

In general terms, the **EP gender sensitiveness**, including both the political and the administrative level, has been measured by EIGE (EIGE, 2019a) with a specific tool-kit¹ aimed at measuring the level of gender equality achieved by the Institution in 5 different areas. According to this index, the EP gender sensitiveness has achieved an overall score of 75,8%.

FIGURE 1: EP GENDER SENSITIVENESS INDEX



Source: EIGE, 2019

¹ EIGE (2019a) “...A parliament is gender-sensitive when it actively respects and delivers on gender equality. The Inter-Parliamentary Union (IPU) defines parliament gender-sensitivity as follows: A parliament that responds to the needs and interests of both men and women in its composition, structures, operations, methods and work. Gender-sensitive parliaments remove the barriers to women’s full participation and offer a positive example or model to society at large. They ensure that their operations and resources are used effectively towards promoting gender equality. A gender-sensitive parliament is one in which there are no barriers – substantive, structural or cultural – to women’s full participation and to equality between its men and women members and staff. It is not only a place where women can work, but also one where women want to work and contribute. A gender-sensitive parliament sets a positive example by promoting gender equality and women’s empowerment among society both nationally and internationally. A gender-sensitive parliament is therefore a modern parliament; one that addresses and reflects the equality demands of a modern society. Ultimately, it is a parliament that is more efficient, effective and legitimate...”

PREVIOUS EXPERIENCES OF GENDER BUDGETING IN THE EUROPEAN UNION

The EU has approached the GB strategy as part of the gender mainstreaming perspective, first at a political level since 2002, and only in recent years, starting from 2015, at an administrative level.

At the **political level**, the EU, in line with the Beijing Platform for action, has promoted GB within EU Governments at any level since 1996. A first reference to GB can be found in the 1996 Commission Communication (COM(1996)63 Final), in the 3rd and 4th Community Action Programme for the promotion of equal opportunities between women and men, and especially within the Framework of the Strategies of Action for Equal Opportunities for 2001-2005. In 2001, the Belgian presidency organized the first community-wide conference on “Gender Responsive Budgeting” followed in 2003 by the European Parliament Resolution on Equal Opportunities for Women and Men 1.3.30. on “Gender budgeting - Building public budgets from a gender perspective” (European Parliament, 2002).

Within such legal framework and thanks to funding programmes, GB initiatives have spread throughout Europe since 2003 at any numerous levels (national, regional and local). A milestone initiative at the methodological level is the publication by the Council of Europe in 2005 of the “Gender budgeting Final report of the Group of specialists on gender budgeting” (Council of Europe, 2005). Since then European institutions have called for gender budgeting actions characterized by a mainstreaming approach. For example, gender budgeting is recommended in resolutions concerning climate justice (European Parliament, 2018), poverty (European Parliament, 2016a), digital age (European Parliament, 2016b), economic crisis (European Parliament, 2013).

At the EU budget level a first analytical study was promoted by the Budgetary Affairs Department of the EU Directorate-General for internal policies. This study experimented the Capability approach in six main areas of the Commission’s budget (European Parliament, 2015), and was followed in 2019 by an update (European Parliament, 2019). Both studies highlight critical areas and underline the need for a more consistent commitment of the EU to GB:

- “..In 2019, the annual budget suffers from inconsistencies between different chapters as to whether, and to what extent, the principle of gender equality is observed.
- Gender equality is not mentioned in the forthcoming 2021-27 MFF.
- The legal basis of EU spending programmes shows a weak and piecemeal commitment to gender equality⁸.
- Gender budgeting and gender mainstreaming are not debated in plenary sessions, which is a significant opportunity to make a political case for gender budgeting.
- The Juncker Commission never mentioned gender budgeting among key priorities..”

At the **methodological level**, it's the EIGE commitment to GB with research like: “Gender mainstreaming: Gender budgeting” (EIGE, 2017) and “Gender Budgeting” (EIGE, 2019b), “Gender budgeting. Mainstreaming gender into the EU budget and macroeconomic policy framework” (EIGE 2019c).

In 2019, the **EP Resolution** on “Gender mainstreaming in the European Parliament” (European Parliament, 2018c) called the EU to a stronger commitment to GB:

- “..Calls for the new MFF, like the last MFF, to be accompanied by a joint declaration by Parliament, the Commission and the Council, committing them to ensure that the annual budgetary procedures applied for the MFF integrate, as appropriate, gender-responsive elements, taking into account the ways in which the overall financial framework of the Union contributes to the objective of achieving equality and ensures gender mainstreaming;
- Reiterates the importance of the application of gender budgeting at all levels of the budgetary process; deplores the absence of gender budgeting mechanisms in the EU institutions, despite a strong commitment to them; urges Parliament’s responsible bodies to incorporate the gender perspective and use gender indicators when drafting and adopting Parliament’s estimates, and throughout the discharge process;
- Is concerned that despite strong institutional and political statements, gender equality objectives are not explicitly stated in Parliament budget documents nor taken into account at all stages of the budget process;..”

A Briefing note by the EP Policy Department for Budgetary Affairs has recently summarized the **recommendations** that should outline the EP GB strategies for the future:

“...The EU’s macro-political level commitment to gender equality and gender mainstreaming should be reflected in the drafting and implementation of the EU budget and pursued at the micro-political level for all policies that receive funding from the EU budget.

*Particularly in cross-cutting issues that fall within the remit of several budget titles, it is essential to pursue gender equality objectives and fulfil gender mainstreaming **in all budget titles**. In order to increase the transparency of the budget, specific amounts allocated to individual actions and policy objectives should be specified in the budget.*

*In all actions financed by the EU budget, gender-specific **indicators** should be adopted and applied in the project selection, monitoring and evaluation phases. In order to ensure financial accountability and transparency, the data should be made available to the public.*

*In the light of the EU budgetary and legislative processes, these recommendations require the commitment of several **actors involved** in the process to gender equality. The European Commission (EC) should screen the legal bases of the budget titles analysed in this report to make sure that gender equality and gender mainstreaming are **recognised horizontally in the titles** and in the rest of the budget. In titles where gender equality and mainstreaming are not embedded in the legislative framework, the EC should start the legislative process with a view to amending the legislation in question to address this deficit.*

*When drafting their individual budgets, EU institutions and bodies should clarify the potential gender equality impacts of their spending decisions. They should also specify **target groups of beneficiaries**, and participants of their actions, on the basis of gender as well as other intersectional characteristics (such as race, economic class, migration status, religious background and LGBT status) which might potentially cause discrimination or inequalities in the implementation of the specific policy in question.*

A specific gender equality objective should be defined for each budgetary item... (European Parliament, 2020b).

At political level, in December 2020 an **Interinstitutional Agreement** between the EP, the Council of the EU and the European Commission on budgetary discipline was adopted. The Agreement mentions GB where “.. *The Commission will examine how to develop a methodology to measure the relevant expenditure at programme level in the Multiannual Financial Framework 2021-2027. The Commission will use that methodology as soon as it is available. No later than 1 January 2023, the Commission will implement that methodology for certain centrally managed programmes to test its feasibility. At mid-term, it will be explored whether the methodology can be extended to other programmes for the remainder of the MFF 2021-2027...*” (European Parliament, 2020c).

More recently, in January 2021, the EP also adopted a Resolution concerning the 2020-2025 Commission’s **Strategy for Gender Equality**. In this document, GB is recommended by the EP which “*calls in addition for guidelines to be put forward, as well as a roadmap on how to implement the intersectional and gender mainstreaming approaches, including gender budgeting, effectively in EU policy making, and for specific tools (such as indicators, targets and monitoring tools) to be developed, as well as for adequate human and financial resources to be allocated, allowing their application in all EU policies;..... regrets the lack of gender budgeting in the new MFF and Structural Funds; calls on the Commission to further promote and improve the use of gender budgeting..... calls on the Commission to step up its efforts to implement gender budgeting as an integral part of the budgetary procedure at all stages and in all its budget lines, and include independent budget lines for targeted actions; underlines that every new measure, mechanism or strategy should undergo a gender impact assessment; welcomes the fact that, for the first time ever, gender mainstreaming will be a horizontal priority in the MFF and will be accompanied by a thorough gender impact assessment and monitoring of the programmes...*”(European Parliament, 2021)

THE METHODOLOGY ADOPTED FOR THE GENDER BUDGETING REPORT OF THE EUROPEAN PARLIAMENT

Since the mid-80s, GB initiatives have been implemented in several countries with the goal of achieving GE thanks to the adoption of a gender mainstreaming approach to the budget analysis.

Despite the fact that all GB projects share common features, some methodological tools have been adapted to meet the specific requirements of different public entities such as States, Regions, Municipalities, Chambers of Commerce, and Universities. For this reason, there hasn't been so far an officially recognized GB standard methodology, but only some successful theoretical frameworks that have been adopted by most GB initiatives.

The methodology used for this preliminary study on a GB Report of the EP, therefore, has some aspects in common with other similar GB initiatives already carried out, but at the same time it reflects the unique characteristics of an institution that really differs from any other, since the EP:

- is a legislative body with no direct competence on the management of public resources concerning services and contributions to citizens;
- has its own budget, which is an administrative budget, whose function is to support the operation of the Institution.

In order to adopt gender as a perspective for the EP budget analysis it takes four steps to:

1. Define which men and women are involved in the EP GB analysis |WHO: Stakeholders.
2. Decide the extent of the budget and the kind of gender impact under examination |WHAT: Inputs.
3. Set specific objectives for the EP in the gender impact evaluation of expenditures |WHY: sustainability.
4. Link the resources to the women's and men's capabilities |HOW: Reclassification.

1. Define which men and women are involved in the EP GB analysis |WHO: Stakeholders

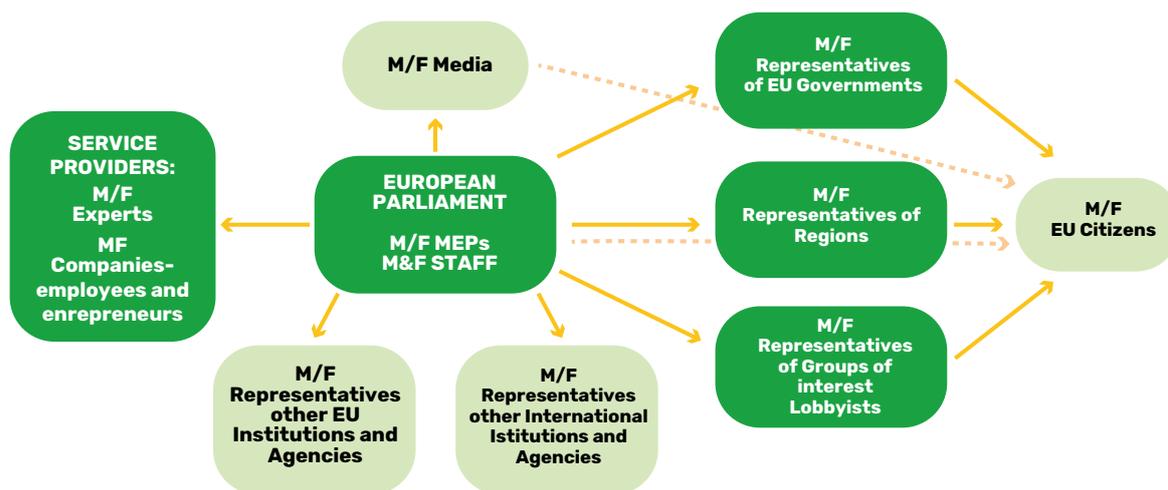
The first methodological issue to face, in the case of the EP, is the definition of which men and

women are involved in the GB analysis. Most of the previous GB experiences, carried out by institutions such as States, Regions, and Municipalities, usually refer to men and women as citizens to comply with their democratic mission.

As a matter of fact, whereas citizenship is the primary relationship between individuals and institutions, there are also other perspectives to consider, that most of GB experiences overlook, since citizens also relate to public administrations with other roles like for example the roles of employees, experts, politicians, entrepreneurs, service providers' workers, NGO's volunteers ecc. All these individuals, women and men, are therefore both citizens and stakeholders involved into the functioning of the EP institutional system.

An institution like the EP, enters in contact at different levels with numerous groups of stakeholders, that may be summarized in a Stakeholders' map. For the purposes of this preliminary study, three main stakeholders groups have been taken in consideration: (1) MEPs and (2) STAFF, as internal stakeholders; and (3) Service providers (Experts and companies) as external stakeholders.

FIGURE 2: EP STAKEHOLDERS' MAP



Source: Our elaboration

2. Decide the extent of the budget and the kind of gender impact under examination

- **WHAT: Inputs**

The second methodological issue to highlight, while developing a GB report of the EP, concerns the **extent of the budget under examination**. GB initiatives developed at State level usually deal with the overall State budget, thus including the legislative and executive powers as a whole and analysing the impact of laws through their enforcement, the allocation of resources, and destination of funds to citizens. The main GB projects, therefore, have usually focused on the gender impact of the States' main outputs in terms of services provided, as an overall result of the States' legislative and executive functions, thus focusing the analysis on final outputs. As a matter of fact,

it is possible to widen the point of view and define the use of public money, with respect to men and women, through its impact at three levels:

Inputs: the financial, human, and material resources needed to implement the public intervention.

Outputs: the products, in terms of services and contributions, allowing a public institution to fulfil its mission with regard to its citizens.

Outcomes: the effects of the outputs and their impact on citizens in the short and in the middle-long term perspective.

In the case of the EP the three levels of input-output-outcome impact may be then defined with reference to the different categories of stakeholders involved.

Input analysis: it's the perspective adopted for this preliminary study. In this case the gender analysis refers to direct workers such as Members of Parliament (MEPs), Officials, Staff and Parliamentary Assistants (STAFF), and indirect workers, such as external experts and all the workers employed by EP service providers (SERVICE PROVIDERS).

Although the gender budget analysis in terms of outputs and outcomes is not the focus of this project, it is important to define these two perspectives in order to offer an overview of the overall gender impact of the EP.

Output analysis. In this case, the EP budget may be analyzed from the point of view of the “products” of the institution, which are represented by the body of laws that the EP has enacted. Thus, conducting an output analysis means defining the number and kind of laws that have an impact on the women and men of the EU as final output. An intermediate gender analysis may also be carried out on the preparatory activity that the EP runs to achieve the final legislative output. In this case, the output analysis explains how the EP budget is spent with reference to the number and kind of EP laws connected to the citizen's gender issues.

Outcome analysis examines the extent of the impact of the EP outputs/Laws on F/M citizens in terms of their well-being, analyzing for example how EP laws changed their lives, their different impact on their capabilities and their social and economic condition. Typically, the outcome analysis is rare, since it requires a medium-long term perspective to evaluate the different consequences and impacts on men and women.

3. Set specific objectives for the EP in the evaluation of the gender impact of expenditures |WHY: sustainability.

In the last decades there has been a growing interest to evaluate the impact of budgets on the stakeholders involved, in terms of social responsibility and more recently, in terms of a wider concept of sustainability referring to the Sustainable Development Goals (SDGs) of the UN Agenda 2030, that the EU is also committed to achieve. The Agenda 2030 is a global call to action, both to Governments

and companies, to eradicate poverty, find sustainable and inclusive development solutions, ensure everyone's human rights. The concept of sustainability defined by the Agenda 2030 fits well with the specific objectives of an EP GB analysis, since it includes:

- the gender equality goals, both in a specific goal and as a cross cutting goal in other targets (Goal n. 5, UNWOMEN, 2018, p.1),
- the citizens' well-being and GE goals that define the public sector mission,
- the human resources well-being and GE goals that define the working and business relationship between the EP as employer (MEPs and STAFF) and as purchaser of services and goods (Service providers).

The input perspective therefore enhances the EP GE objectives in terms of employer and purchaser of services and goods, that may be referred to the GE objectives of the Global Reporting Initiative (GRI Standards) and to the WEP Principles (Women's Empowerment Principles) of the Global Compact United Nations Programme.

In terms of Gender impact, the GRI has published specific guidelines on **"Embedding gender in sustainability reporting"** (GRI&IFC, 2009). The GRI guidelines outline a gender analysis that can be applied to all the stakeholders. The starting point is obviously the analysis of human resources in the framework of the company's governance and mission. The gender analysis will then focus on customers/consumers, on suppliers and on the supply chain, on investors and on the community as a whole.

The seven **Women's Empowerment Principles (WEP)**² are promoted by the Global Compact UN initiative to empower women in the workplace, the marketplace, and in the community.

Principle 1: Establish high-level corporate leadership for gender equality

Principle 2: Treat all women and men fairly at work – respect and support human rights and nondiscrimination

Principle 3: Ensure the health, safety and well-being of all women and men workers

Principle 4: Promote education, training and professional development for women

Principle 5: Implement enterprise development, supply chain and marketing practices that empower women

Principle 6: Promote equality through community initiatives and advocacy

Principle 7: Measure and publicly report on progress to achieve gender equality

4. **Link the resources to the women's and men's capabilities |HOW: Reclassification**

The main challenge while approaching a GB analysis is to create a connection between the budget items and their impact on women and men. Budgets are in fact made to account for the means that it is possible to quantify from a financial perspective (i.e. the services and the products that are

2 Source: UN Global Compact and UN Women, The Women's Empowerment Principles (WEPs) <https://www.weps.org/about>

purchased), and only in few cases allow to identify the women and men that are involved in terms of stakeholders.

For this reason, EP budget items describe expenditures like, for example, salaries, allowances, services, maintenance, buildings, but it takes a further level of analysis to evaluate their impact on stakeholders, and a further one to assess the gender impact.

To link the three main groups of stakeholders of the EP involved in the input perspective to the budget and evaluate its gender impact on them, it takes a double level of **budget reclassification**, which determines the budget's order and priorities with respect to its impact on the direct/indirect F/M beneficiaries and the main capability involved. This double level of reclassification was inspired by the two main reclassification methodologies that most Gender Budget national projects have experimented so far, which have been adapted to better fit to the EP characteristics.

The Account Based Approach reclassification defines a gender scale of priorities, which represent the intervention areas having a greater impact on gender equality.

In the case of the EP GB analysis, this kind of classification has three levels of orders:

The first order concerns budget items whose male-female internal stakeholders directly receive the resources (e.g.: like salaries, pensions, allowances, paid overtime etc.)

The second order identifies budget items whose male-female internal stakeholders (MEPs and STAFF) have access to services provided by service providers (e.g.: childcare facilities, languages and computer courses, training, travels, insurance, etc.).

The third order refers to budget items that provide for external services needed by the EP for its operation. This order includes people (like male-female external experts) and supplying companies, whose gender impact affects/consists of the human resources they put at the EP disposal.

The second level of reclassification concerns the well-being objective and refers to **the Capability Approach**.

The capability approach applied to GE and wellbeing is based on Amartya Sen and Martha Nussbaum's Theories (Sen, A.K.,1993) and has been adopted since 1990 by the UN as a framework of the Human Development Program. It was first applied to Gender Budgeting methodology by University of Modena and Reggio Emilia in 2002 (Addabbo et al., 2010) and experimented at territorial level in Italy for many years (Municipality and Province of Modena, Municipality and Province of Bologna, Province of Rome, Lazio, Piedmont and Emilia Romagna Region), in other countries like Turkey and in Senegal (Addabbo et al., 2011; Addabbo, 2016; Addabbo et al. 2019). This approach has already been adopted by the two above mentioned preliminary studies of the Commission on EU Gender Budgeting (European Parliament, 2015 and 2019).

“The use of Amartya Sen and Martha Nussbaum's capability approach extends the focus of

gender budgeting to the impact of policies on wellbeing, with its multiple dimensions and complexity, departing from an evaluation based exclusively on income or commodities. Well-being is defined at the individual level, and this, also according to feminist economics, requires investigating what happens inside the family and recognising the possibility of conflicts amongst its members on the construction of wellbeing.” (Addabbo, 2016, p.59)

In the case of the EP, since budget items may have a multidimensional gender impact on numerous capabilities of different stakeholders, it has been decided to highlight the main stakeholder’s capability involved into the budget item.

FIGURE 3: EP CAPABILITIES’ MAP



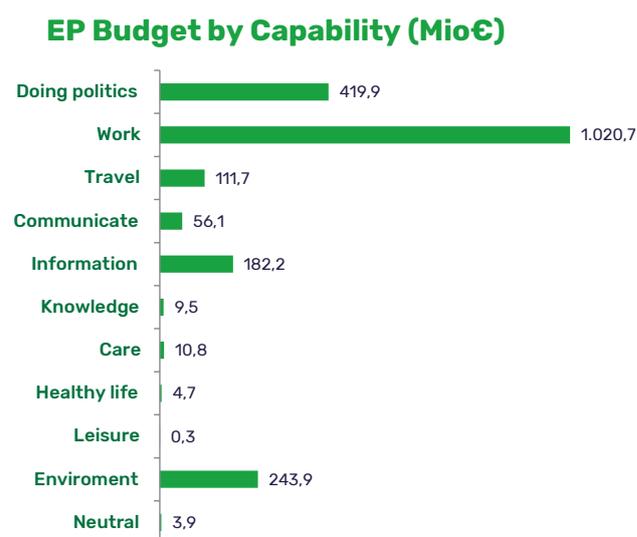
Source: Our elaboration

BUDGET RECLASSIFICATION ACCORDING TO THE ACCOUNT BASED AND CAPABILITY APPROACH

In general terms, the EP budget 2021 is structured in Titles, Chapters, Articles and Budget Items that describe the role that each kind of expenditure has to support the EP Operation, in terms of human resources involved and services purchased (European Parliament, 2020d)

Being the EP budget an administrative budget, the accounting system gives evidence of the means used to allow the EP to provide for its institutional functions. The **EP budget reclassification by capability**, on the other hand, gives evidence of how expenditures are spent to develop human capabilities and creates a first connection to their impact on people in general terms.

FIGURE 4: EP 2021 BUDGET BY TITLE AND BY CAPABILITY



Source: Our elaboration on EP Budget, 2021

In this preliminary report, reclassification has been possible only at budget item level. It has to be considered therefore a very rough level of reclassification, since different items include several heterogeneous kind of expenditures that should be allocated to different capabilities.

To test the GB methodology proposed for the EP, the classification follows the main issue described by each budget item, but in view of a final GB report a further in-depth analysis is recommended.

A second step connects the EP budget reclassified by capability to the main stakeholders involved.

The three orders of expenditures also give evidence

- of the direct impact of financial resources on the main stakeholders (MEPs and STAFF) involved in the EP operation (1st order),
- of the indirect impact of services specifically intended for MEPs and STAFF, that also impact on their service providers (2nd order),
- of general expenditures that impact mainly on service providers, since there is not the possibility to input these kind of services to MEPs or STAFF.

TABLE 1: EP BUDGET 2021 BY MAIN STAKEHOLDERS, CAPABILITY AND ORDER

CAPABILITIES BY STAKEHOLDER	MEPS		STAFF		SERVICE PROVIDERS	NEUTRAL	TOTAL
	1ST ORDER	2ND ORDER	1ST ORDER	2ND ORDER	3RD ORDER		
Doing politics	129.849.273	-	-	-	290.027.220	-	419.876.493
Work	-	-	1.020.558.621	150.000	-	-	1.020.708.621
Travel	-	72.900.000	-	1.610.000	37.144.000	-	111.654.000
Communicate	-	-	-	-	56.061.421	-	56.061.421
Information	-	-	-	-	182.188.500	-	182.188.500
Knowledge	-	750.000	-	8.766.000	-	-	9.516.000
Care	-	1.258.000	-	9.522.250	-	-	10.780.250
Healthy life	-	2.819.000	-	1.892.350	-	-	4.711.350
Leisure	-	-	-	265.000	-	-	265.000
Enviroment	-	-	-	-	243.887.500	-	243.887.500
Neutral	-	-	-	-	-	3.872.000	3.872.000
TOTAL	129.849.273	77.727.000	1.020.558.621	22.205.600	809.308.641	3.872.000	2.063.521.135

Source: Our elaboration on EP budget 2021

The two capabilities included in the **first order** of reclassification have been defined as “Doing Politics” for the MEPs, and as “Working” for the STAFF, and refer to budget items connected with their salaries and allowances.

The capabilities related to the **second order** refer to services for MEPs and STAFF, provided for by Service Providers, that enable the capabilities of Working, Travelling, Having access to knowledge, Caring for oneself and others, living a healthy life, and Having leisure time. In this case there is a double gender impact to evaluate, in terms of outputs, concerning the services that MEPs and STAFF use, and in terms of inputs, referring to the experts, employees and entrepreneurs among Service Providers.

The capabilities that the **third order** refers to concern services that are not directly connected to the MEPs and STAFF, but that are essential to the Institution’s operation. This is the case of services that enhance the capabilities connected to living and working in safe and suitable places and in an eco-compatible environment, and to have access to ICT and to linguistic communication.

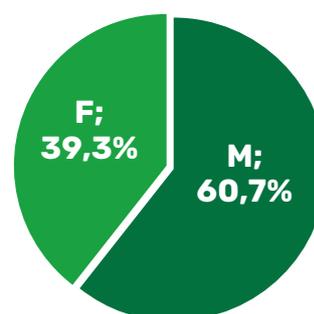
At this point, having connected the budget to capabilities and then to people in terms of stakeholders, the next GB step implies the evaluation of the gender impact of the EP budget.

Also in this case, only a few gender indicators were available during the exploring phase, that also included interviews to EP STAFF. Despite this, it was useful to define the main gender issues to investigate in the next future and to outline recommendations on how to implement the EP GB analysis.

2.1 MEPs Gender Budgeting by capability

FIGURE 5: MEPS: EP BUDGET 2021 BY CAPABILITY AND ORDER, MEPS BY GENDER

EP BUDGET 2021 BY STAKEHOLDER: MEPS	CAPABILITY	%
Doing Politics - 1st order	129.849.273,00	62,6%
Travel - 2nd order	72.900.000,00	35,1%
Knowledge - 2nd order	750.000,00	0,4%
Care - 2nd order	1.258.000,00	0,6%
Healthy life - 2nd order	2.819.000,00	1,4%
TOTAL	207.576.273,00	100,0%
% overall budget	10,1%	



Source: Our elaboration on EP Budget 2021 and European Parliament (2020d)

Overall considerations: The EP allocates 10,1% of its administrative budget to the MEPs as stakeholders, for a total amount of 207,5 Mio€. 62,6% of this amount is spent for salaries, allowances and pensions (129,8 Mio€) that will be directly paid to MEPS to their political commitment (1st order).

An important 2nd order budget item referring to the MEPs is the Mobility and Travel Capability, for 72,9 Mio€ of expenditures. This budget item refers to the second order.

Other 2nd order services provided by the EP include the capability of Living an healthy life, thanks to 2,8 Mio€ allocated for the accident and sickness insurance and other social security charges, the capability of caring for oneself and others (specific measures to assist disabled members, 1,2 Mio€) and the capability to have access to knowledge for Language and computer courses for MEPs.

From the gender point of view, MEPs expenditures are not discretionary since their attribution to men or women are directly connected to the EP election results. This kind of analysis is, anyway, useful to raise awareness at the political level, since it outlines a different perspective on the gender gap in the European Parliament, offering a financial analysis of the gender gap concerning the number of male/female MEPs. For this purpose, despite there is not yet the possibility to split precisely such amounts between female and males MEPs, it is possible to roughly estimate that the amount of resources available to MEPs is allocated to women and men consistently with the EP gender composition: 39,3% women, i.e 82 Mio€m, and 60,7% men, i.e 125 Mio€.

Gender issues concerning MEPs:

There are some common gender issues that been identified and studied with reference to National Parliaments that may be relevant for the EP as well:

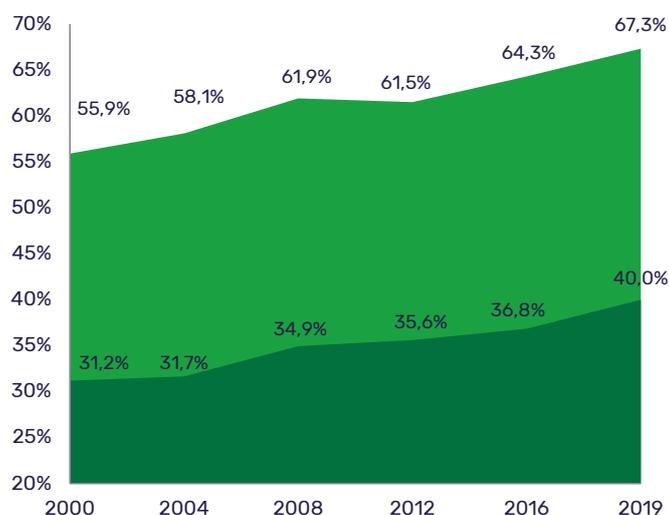
- Gender imbalance in quantitative terms: the % of female MEPs compared to the % of male MEPs.
- Gender imbalance in the decision making process (vertical segregation), i.e. the % of females and males in leadership positions within the Parliament.
- horizontal gender segregation, i.e the unbalanced distribution of females and males within commissions and delegations depending on the economic and social issues being discussed
- Gender Stereotypes, i.e the unconscious and conscious gender bias that may affect both female and male MEPs that could therefore impact political efficacy in negotiations and debates.
- Work-life balance, i.e the different needs in terms of work-life balance for females and males MEP that, because of stress, may also influence their political productivity and efficacy
- Code of Conduct, i.e. the formal and informal rules in terms of personal behaviour between men and women MEPs that may prevent instances of harassment and/or psychological and verbal violence

Gender imbalance in quantitative terms

The EP is composed of 705 members, 39,5% of which are women, which means that the gender gap (where 100% represents the 50% gender balance) is 78,5%. Since this composition by gender is a consequence of the elections' results in each member country, it reflects the level of women's political empowerment in the European Union as a whole. Despite the fact that a gender balance (50%) has not been achieved yet, the EP % of women elected is considerably high if we compare it for example to the EU-27 national parliaments where the overall gender balance is lower, at 28,6%, and to the world average for national parliaments (European Parliament, 2020e).

FIGURE 6: MEPS' FEMALE RATE AND EU27 FEMALES EMPLOYMENT RATE 2000-2019 (EUROSTAT, 2019)

EP MEPs vs EU27 Employment rate

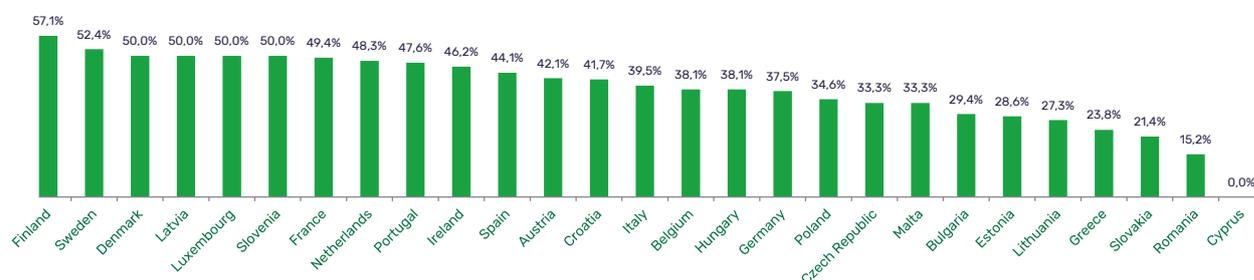


Source: Our elaboration on Eurostat 2019 and European Parliament (2020e)

Over the years the gender balance within MEPs has increasingly improved. This trend has been strongly supported by the correspondent increase in the female employment rate 20-64 years of the EU-27. It is important to underline how, despite the fact that the EP is not directly involved in the gender balance of MEPs, the EU-27 political choices on women's employment directly impact women's presence at the EP and thus improve the EU-27 democracy. Since democracy is a representative process, when women, that are more than half of the EU-27 population, are adequately represented, we witness a significant increase in the quality of democracy .

As for the gender balance by country, the state member with the highest percentage of female MEPS is Finland (57,1%), followed by Sweden (52,4%), and Denmark, Latvia, Luxembourg, Slovenia (all at 50%). The lower gender balance refers to Bulgaria (29,4%), Estonia (28,6%), Lithuania (27,3%), Greece (23,8%), Slovakia (21,4%), Romania (15,2%), Cyprus (0,0%).

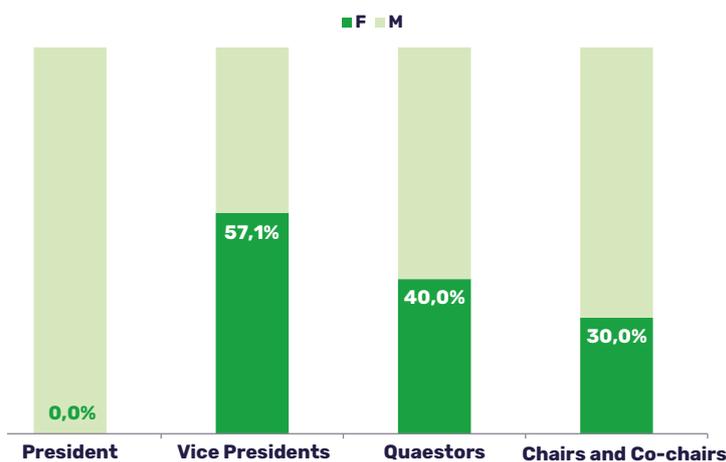
FIGURE 7: MEPS FEMALE RATE BY EU27 COUNTRY



Source: Our elaboration on European Parliament (2020e)

Gender imbalance in the decision making process (vertical segregation)

FIGURE 8: LEADERSHIP POSITIONS IN THE EP



As for the leadership positions in the EP Bureau, the President is a male, women are 57,1% of vice-presidents (8/14), and 40% of quaestors (2/5). As for the Political Groups, women are 30% of chairs or co-.chairs (3/10).

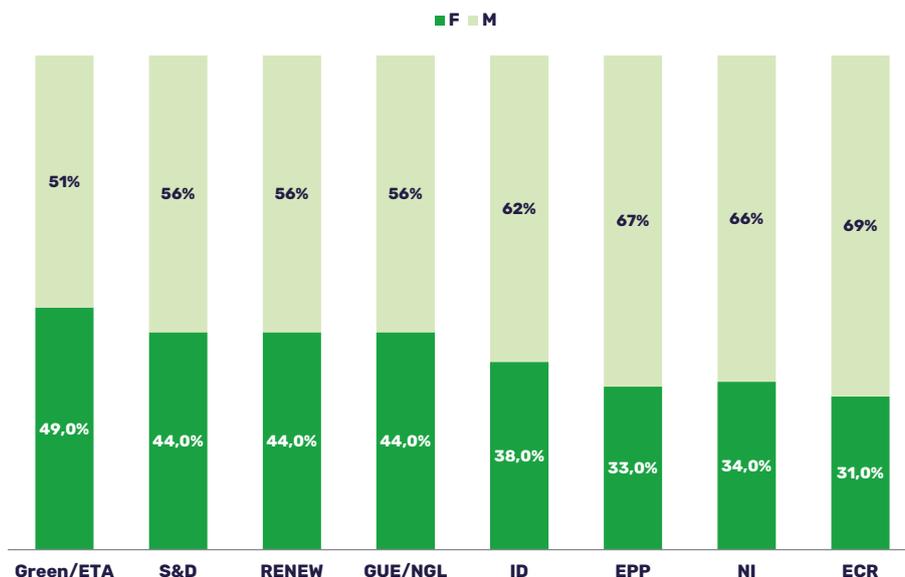
Source: Our elaboration on European Parliament (2020e)

The gender composition of the political groups is influenced by the elections' results and by the different political attitudes with respect to the role of women in society and in politics.

The political group with the highest presence of women is the Greens/European Free alliance,

where women are 49% of MEPs, followed by three groups with 44% of women MEPs: the Group of the progressive alliance of Socialists and Democrats, the Renew Europe Group, and the Group of the European United Left – Nordic Green Left. A lower presence of women among MEPS may be found within the Group of the European People Party (Christian Democrats (33%), the European Conservative and Reformists (31%), the Identity and Democracy Group (38%) and Non-attached members.

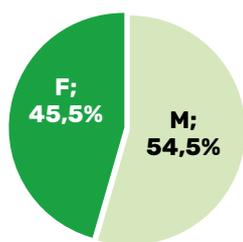
FIGURE 9: EP POLITICAL GROUPS BY GENDER



Source: Our elaboration on European Parliament (2020e)

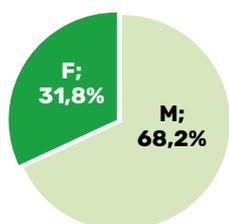
FIGURE 10: EP COMMITTEES' AND DELEGATION'S CHAIRS BY GENDER

EP Committees' Chairs



MEPS prepare the activity of the Parliamentary plenary sittings by working in 20 standing **committees** and two subcommittees, where reports and legislative proposals are drafted. Among the 22 chairs of Committees, 10 (45,5%) are women.

EP Delegations' Chairs



Delegations contribute to the EP activity by supporting the international contacts of the EU, mainly with non-EU countries. Currently women are 37,7% of the chairs of the 44 delegations.

Source: Our elaboration on European Parliament (2020e)

Recommendations

For the future it may be possible to link the quantitative MEPs gender statistics to the budget in terms of **potential beneficiaries** according to estimations based on past expenditures. This would entail an in-depth analysis of specific budget items and an investigation aimed at determining how much the EP spends for F/M MEPs (Salaries and allowances, accident and sickness insurance and other welfare measures, transitional allowances, pensions or language and computer courses).

TABLE 2: MEPS EP BUDGET RECLASSIFICATION BY CAPABILITIES DETAIL BY ORDER AND BUDGET ITEM

EP BUDGET 2021 BY STAKEHOLDER: MEPS	1ST ORDER	2ND ORDER	TOTAL
DOING POLITICS	129.849.273,00	-	129.849.273,00
Item 1 0 0 0 – Salaries	76.747.273	-	76.747.273
Item 1 0 0 6 – General expenditure allowance	39.500.000	-	39.500.000
Item 1 0 0 7 – Allowances for performance of duties	191.000	-	191.000
Item 1 0 3 0 – Retirement pensions (PEAM)	9.270.000	-	9.270.000
Item 1 0 3 1 – Invalidation pensions (PEAM)	171.000	-	171.000
Item 1 0 3 2 – Survivors’ pensions (PEAM)	1.959.000	-	1.959.000
Item 1 0 3 3 – Optional pension scheme for Members	1.000	-	1.000
Article 1 0 2 – Transitional allowances	2.010.000	-	2.010.000
TRAVEL	-	72.900.000	72.900.000
Item 1 0 0 4 – Ordinary travel expenses	-	67.400.000	67.400.000
Item 1 0 0 5 – Other travel expenses	-	5.500.000	5.500.000
KNOWLEDGE	-	750.000	750.000
Article 1 0 5 – Language and computer courses	-	750.000	750.000
CARE	-	1.258.000	1.258.000
Item 1 0 1 2 – Specific measures to assist disabled Members	-	1.258.000	1.258.000
HEALTHY LIFE	-	2.819.000	2.819.000
Item 1 0 1 0 – Accident and sickness insurance and other social security charges	-	2.819.000	2.819.000
TOTAL	129.849.273	77.727.000	207.576.273

Source: Our elaboration on EP Budget 2021

In terms of **capabilities**, the input analysis emphasizes the perspective of the “Doing Politics” capability, and also offers the opportunity to widen the perspective on the care capability, including, for example, the unpaid domestic and care work of F/M MEPs, and their work-life balance strategies that may impact their work and their political activity. In future gender budgeting initiatives, a questionnaire (unless the data are already available) may allow to collect data on F/M MEPs’ family status, number and age of children, their strategies to balance life and work, their unpaid workload, and possible issues connected to their frequent commutes.

An **Output analysis** might consist in linking the expenditures for F/M MEPs to a few activity indexes that might show a different F/M commitment to EP goals from a quantitative point of

view, that consists in measuring how much F/M MEPs work (percentages of rate of attendance at EP sessions, etc.), how they distribute their working time among Committees, Delegations, Plenary etc. and in linking such indexes to the F/M MEPs expenditures.

A second quantitative analysis might consist in quantifying the vertical and horizontal segregation in the top positions, their different distribution among Committees, Delegations, political groups etc and the different issues F/M MEPs are mainly engaged in. A first analysis of the MEPs requests to the DG Research for analysis, notes and information, has highlighted a clear gender difference in areas of policy interest. Females' requests are mainly focused on issues like Gender Issues, Equality and Diversity (70,2% of requests comes from F MEPs), Private International Law and Judicial Cooperation in Civil Matters (66,6%), Culture (61,5%), Education (53,3%), Area of Freedom, Security and Justice (50,8%), Ex-ante Impact Assessment (50,0%), Social Policy (47,0%). Males' main areas of interest are more concentrated on Budgetary Control (90,5% of requests come from M MEPs), Taxation (82,9%), Intellectual Property Law (81,3%), Transposition and Implementation of Law (77,8%), Financial and Banking Issues (76,9%), Budget (74,6%) (Source: DG- EPRS, 2020).

It might also be interesting to look into how much time is spent by F/M MEPs on Parliament work, in terms of rate of attendance, time spent in plenary sessions, time spent in Committees, Delegations etc

In the future, a possible **Outcome Analysis** might measure the different political results that F/M MEPs have achieved in different fields; this would allow to highlight possible gender differences in values, principles, priorities, interests, but also capabilities and political skills. Various studies have proved the different and sometimes better results achieved by women in politics and it might be interesting to have similar indexes for the F/M MEPs.

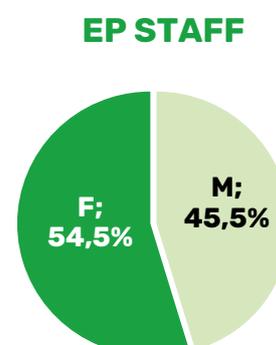
Therefore, this level of analysis does not includes an overall description of the gender equality initiatives of the EP but it aims at connecting the F/M MEPs activity to the different political results they have achieved. These results concern not only gender related issues, but also MEPs' overall parliamentary activity, in a gender mainstreaming perspective. Such an analysis could demonstrate, for instance, the different interest and commitment of Female MEPs for climate change issues.

Another place of interest in the outcome analysis might focus on the constraints that may hinder female MEPs development of their full political potential and therefore also of their political outcomes. This aspect is directly linked to the existence of **gender stereotypes** that may influence the political debate between F/M MEP and therefore affect the EP final decisions. A few studies have highlighted that female politicians have faced challenges in formal and informal negotiations because of the persistence of gender stereotypes and this could negatively impact their political activity. For this reason, it might be advisable to collect information on gender stereotypes by administering specific surveys to F/M MEPs. Various researches and studies have proven that a public acknowledgement of the existence of gender stereotypes within an organization, in this case in the EP, is very successful in overcoming them.

2.2 STAFF Gender Budgeting by capability

FIGURE 11: STAFF EP BUDGET 2021 BY CAPABILITY AND ORDER, STAFF BY GENDER

EP BUDGET 2021 BY STAKEHOLDER: STAFF	CAPABILITY	%
Work - 1st order	1.020.558.621,00	97,9%
Work - 2nd order	150.000,00	0,0%
Travel - 2nd order	1.610.000,00	0,2%
Knowledge - 2nd order	8.766.000,00	0,8%
Care - 2nd order	9.522.250,00	0,9%
Healthy life - 2nd order	1.892.350,00	0,2%
Leisure - 2nd order	265.000,00	0,0%
TOTAL	1.042.764.221,00	100,0%
% OVERALL BUDGET	50,5%	



Source: Our elaboration on EP Budget 2021 and European Parliament (2018a)

Overall considerations: The EP allocates 50,5% of its administrative budget to STAFF as stakeholders, for a total amount of 1.042Mio€. 97,9% of this amount (1.020 Mio€) refers directly to Remuneration and allowances, allowances, entitlements that will be directly paid to STAFF for their work, (1st order), while other 22,2Mio€ are to be spent for services (2nd order) intended for staff to support other capabilities like travelling, access to knowledge, care for oneself and others, healthy life, leisure. Most of these expenditures are not discretionary since they are directly connected to staff regulation, permanent jobs, or to “Allowances upon early termination of service” that refer to past decisions.

Gender issues concerning STAFF:

Past research has highlighted a few gender issues that pertain to the Staff of a Public Institution, such as the EP:

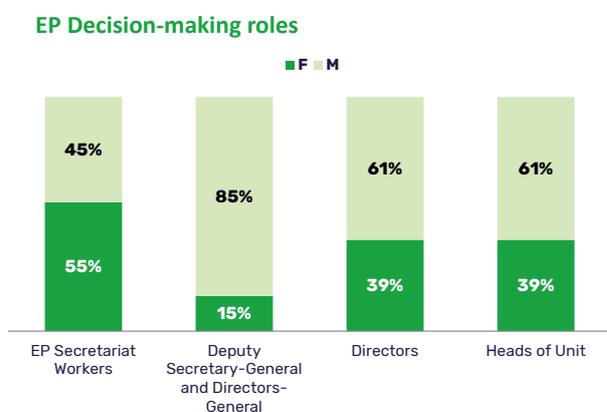
- gender imbalance in the decision making process (vertical segregation), i.e. the % of females and males in leadership positions within the STAFF,
- horizontal gender segregation, i.e. the unequal distribution of females and males within Directorates-General depending on the traditional association of some socio-economic issues to women or to men,
- gender stereotypes, i.e. the unconscious or conscious gender bias that may affect both female and males STAFF and therefore influence their productivity on the job and their career path,
- work-life balance, i.e. the different needs in terms of work-life balance and mobility services for F/M STAFF that may have a different impact regarding stress and life choices and consequently may also influence their different productivity and efficacy,
- code of conduct, i.e. the formal and informal rules in terms of personal behaviour between men and women STAFF that may prevent cases of harassment or psychological and verbal abuse.

The EP STAFF by gender

Data updated to 31/12/2018 show that the EP STAFF includes 10.053 people, of which 6.748 belong to the Parliament’s Staff, 1.103 to the political groups and 2.202 to the APAs (Accredited Parliamentary Assistants). Women are 55% of the Parliament’s Secretariat and 52% of APAs. Between 2013 and 2018 the share of women has decreased from 58,1% to 55,3%. This decrease is mainly due to the reduction in the number of women among “3a contract agents” (for manual or administrative support service tasks) that decreased from 43,4% at the end of 2013 to 26,2% at the end of 2018, mainly because of the EP decision of bringing drivers and security services in-house; services that are characterized by a high presence of male workers.

Gender imbalance in the decision making process (vertical segregation)

FIGURE 12: STAFF: DECISION-MAKING ROLES BY GENDER



Source: Our elaboration on European Parliament (2018a)

Despite the fact that women are 55% of the EP Secretariat workers, leadership roles are still gender unbalanced: women are 15% of the workers in the Deputy Secretary-General and Directors-General, and 39% of Directors and the 39% of heads of unit.

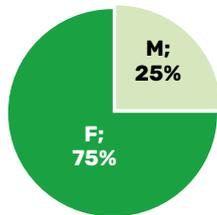
The EP careers’ advancement policies are balancing this gender gap: in 2019 women were 39,3% of applicants for the selection for heads of unit, and 51,6% of the appointed ones.

Work-life balance

Work life balance for staff is supported by the EP in two ways: by providing a certain amount of flexibility with regard to working conditions and by providing for childcare services. As for working conditions, the EP offers to its officials several arrangements for working on a schedule matching employees’ own professional, personal, and family needs. More than 130 different working time formulae are available for officials, besides teleworking and several types of leave.

FIGURE 13: OFFICIALS PART-TIME WORKERS BY GENDER

Officials Part-Time Workers



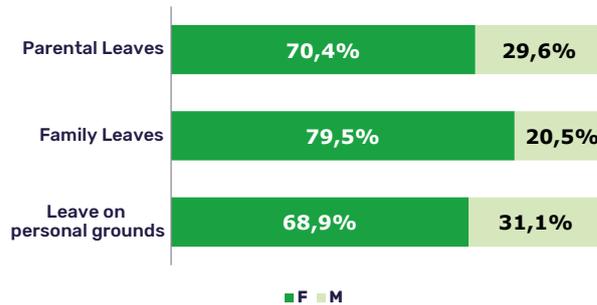
In 2018, 1.553 officials took advantage of **part-time working** arrangements, corresponding to the 23% of all EP officials. Among them, 75% were women, confirming for the EP officials as well the significant amount of domestic and care work performed by female workers. As for the main Function Groups, the higher concentration of female part-time workers was among the AST (Assistants), 81%, while it reached 69,1% among the ADs (Administrators) and 84,8% among the AST/SC (Secretary/Clerks). In terms of part-time options, 46,9% of officials chose the 50% working time arrangement, while 15,3% chose the 80% option.

Source: Our elaboration on European Parliament (2018a)

Different kinds of **leaves** are available for EP workers to promote work-life balance according to the different personal needs; the analysis of the data pertaining leaves shows that women have a more family and care responsibilities.

FIGURE 14: EP LEAVES FOR SECRETARIAT STAFF BY GENDER

EP Leaves for Secretariat Staff



In 2018 70,4% of all parental leaves, which can be taken during the first 12 years following the birth or adoption of a child, were taken by women, as well as 79,5% of all family leaves, that staff members can use in case of serious illness or disability of their spouse, of a relative in the ascending line, of a relative in the descending line, of a brother or a sister, were used at by women.

Source: Our elaboration on European Parliament (2018a)

68,9% of all Leaves on personal grounds (CCP) for exceptional circumstances were taken by women. Maternity leave represents 14,5% of the overall days of absence of the Secretariat Staff (+Accredited Parliamentary Assistants).

Recommendations:

Input analysis: As for the **first order of expenditures**, gender disaggregated data concerning STAFF are already collected and available at the DG-PERS, also in internal publications like the “HR of the European Parliament” (European Parliament, 2018a) that was used for this analysis in the 2018 edition.

In this first explorative phase it was not possible to link the staff quantitative figures to the corresponding budget items. As a consequence, it was not possible for example to share the amount of salaries to women and to men keeping in consideration the different levels, that would have allowed to give evidence to the gendered financial impact of vertical segregation, for example, or of the paid overtime.

Other Budget items of STAFF – 1st order that might offer a gender perspective might also be investigated in the Other Staff expenditures, since a gender impact is conceivable in the expenditures for Security and Drivers, for example. Expenditures for Secretariat, political groups and parliamentary assistance could be more detailed in a implementation phase and be better reclassified in terms of different capabilities included in such varied items.

Interviews to staff also suggested some specific gender issues that might be further investigated like, for example the different categories of long-term absence from work or the reduction of working hours through part-time, that involve mainly women (maternity leave, parental leave, part-time working arrangements, long-term sick leave, leave for personal reasons (CCP)).

Also secondment, e.g. to another institution or to a member states’ administration, that usually offers career opportunities, mainly benefiting men, could be analysed with the gender perspective. Another gender issue might emerge from the analysis of staff replacement policies in case of staff absence, both for familiar and career advancement reasons. In case of missing or insufficient replacement, the overload of work for colleagues might lead to an higher psychological pressure for women to access to work-life balance statutory options.

In the field of staff regulation it could also be analysed the “household allowance” and whether this allowance is promoting in any way a certain choice of one gender in not taking up any employment.

In addition to gender disaggregated data accounting for quantitative and financial statistics, a more qualitative approach might be developed, if not already developed, by specific well-being questionnaires, concerning family, children, their conciliation strategies, unpaid work-load, also considering the frequent STAFF commute status, that might be analysed with the gender perspective and offer new and previously unknown information.

Despite decisions on staff regulations are renewed only every 10 years, and therefore decisions on these budget items are depowered, having a gender perspective on these budget items is important in terms of awareness while new human resources policies may emerge, although within the given financial framework, in order to better promote gender balance.

As for the 2nd order expenditures, that refer to the other capabilities related to the staff further specific gender disaggregated data were not available in this preliminary phase. While suggesting a more in-depth analysis on existing data that may have been overlooked, further gender issues might be investigated as for the mobility expenditures, the expenditures for learning and development, for social welfare and childcare facilities (capability of care for oneself and others), and for health and prevention (capability of living an healthy life). Expenditures for leisure, like measures supporting social contacts between members of staff and other social measures might also be investigated in terms of F/M users.

TABLE 3: STAFF: EP BUDGET RECLASSIFICATION BY CAPABILITIES DETAIL BY ORDER AND BUDGET ITEM

EP BUDGET 2021 BY STAKEHOLDER: STAFF	1ST ORDER	2ND ORDER	TOTAL
WORK	1.020.558.621	150.000	1.020.708.621
Item 1 2 0 0 – Remuneration and allowances	688.256.364		688.256.364
Item 1 2 0 2 – Paid overtime	100.000		100.000
Item 1 2 0 4 – Entitlements in connection with entering the service, transfer and leaving the service	3.000.000		3.000.000
Item 1 2 2 0 – Allowances for staff retired or placed on leave in the interests of the service	2.560.000		2.560.000
Item 1 2 2 2 – Allowances for staff whose service is terminated and special retirement scheme for officials and temporary staff	-		-
Item 1 4 0 0 – Other staff – Secretariat and political groups	65.039.727		65.039.727
Item 1 4 0 1 – Other staff – Security	34.584.545		34.584.545
Item 1 4 0 2 – Other staff – Drivers in the Secretariat	7.444.545		7.444.545
Item 1 4 0 4 – Traineeships, seconded national experts, exchanges of officials and study visits	10.130.440		10.130.440
Item 1 6 1 0 – Expenditure on recruitment		150.000	150.000
Article 4 2 2 – Expenditure relating to parliamentary assistance	209.443.000		209.443.000
TRAVEL		1.610.000	1.610.000
Item 1 6 3 1 – Mobility		1.610.000	1.610.000
KNOWLEDGE		8.766.000	8.766.000
Item 1 6 1 2 – Learning and development		8.115.000	8.115.000
Item 1 6 5 5 – European Parliament contribution for accredited Type II European Schools		651.000	651.000
CARE		9.522.250	9.522.250
Item 1 6 3 0 – Social welfare		867.250	867.250
Item 1 6 5 4 – Childcare facilities		8.655.000	8.655.000
HEALTHY LIFE		1.892.350	1.892.350
Item 1 6 5 0 – Health and prevention		1.892.350	1.892.350
LEISURE		265.000	265.000
Item 1 6 3 2 – Social contacts between members of staff and other social measures		265.000	265.000
TOTAL	1.020.558.621	22.205.600	1.042.764.221

Source: Our elaboration on EP Budget 2021

Despite this preliminary study was focused on the input analysis, it is important to outline the possible field of research concerning the output and the outcome analysis.

Output Analysis consists in linking the expenditures for F/M staff to some activity and Key performance indicators (KPI) that might give evidence of possible gender differences in productivity and commitment.

Outcome Analysis might connect the F/M STAFF support to the Parliament activity, and specifically to the F/M MEPs political efficacy. This kind of outcomes are very difficult to measure and evaluate, since they are indirectly linked to the F/M MEP's outcomes. In any case, also in this case, a point of interest might be focusing on the constraints that may obstacle females' Officials and temporary staff from expressing their full working potential and therefore from improving their professional results.

2.3 SERVICE PROVIDERS: Gender Budgeting by capability

TABLE 4: SERVICE PROVIDERS: EP BUDGET RECLASSIFICATION BY CAPABILITIES

EP BUDGET 2021 BY STAKEHOLDER: SERVICE PROVIDERS	SERVICE PROVIDERS 3RD ORDER	SERVICE PROVIDERS AND MEPS 2ND ORDER	SERVICE PROVIDERS AND STAFF 2ND ORDER	TOTAL	%
Doing politics	290.027.220,00	-	-	290.027.220,00	31,9%
Work	-	-	150.000,00	150.000,00	0,0%
Travel	37.144.000,00	72.900.000,00	1.610.000,00	111.654.000,00	12,3%
Communicate	56.061.421,00	-	-	56.061.421,00	6,2%
Information	182.188.500,00	-	-	182.188.500,00	20,0%
Knowledge	-	750.000,00	8.766.000,00	9.516.000,00	1,0%
Care	-	1.258.000,00	9.522.250,00	10.780.250,00	1,2%
Healthy life	-	2.819.000,00	1.892.350,00	4.711.350,00	0,5%
Leisure	-	-	265.000,00	265.000,00	0,0%
Enviroment	243.887.500,00	-	-	243.887.500,00	26,8%
Total	809.308.641,00	77.727.000,00	22.205.600,00	909.241.241,00	100,0%
% OVERALL BUDGET	44,1%				

Source: Our elaboration on EP Budget 2021

The EP budget concerning Service Providers includes both Experts, whose gender is immediately identifiable, and companies that work with the EP by participating to the selection process according to procurement rules.

Service providers are involved in different kind of services that, from a GB point of view, may be classified into two main groups, the 2nd and the 3rd group, as already described in chapter 5.

An initial budget reclassification has identified budget expenditures in 99,9Mio€ for 2nd order services for MEPS and STAFF and 809,3Mio€ for 3rd order for general services.

Services of the 2nd order may be analysed through a double gender perspective: in terms of gender impact on MEPs and STAFF as beneficiaries and, like other gender expenditures related to the 3rd

order, in terms of gender impact on Experts and employees of Service providers.

These two groups of stakeholders need a specific system to achieve gender disaggregated data, that is not available at the moment, if not for specific cases.

For this reason, in this section main gender issues are identified by best practices, and the few examples of specific indicators that it was possible to collect strengthen the recommendation to create an overall gender disaggregated system of analysis.

General gender issues:

- horizontal segregation for External Experts,
- horizontal and vertical segregation for employees and entrepreneurs of service providers,
- gender procurement for service providers.

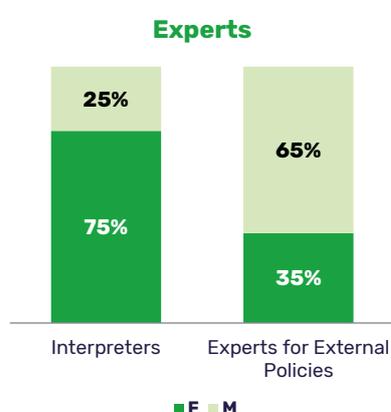
Horizontal segregation for EXTERNAL EXPERTS

The EP relies on experts at different levels to support both the parliamentary work and the administration operation. As for the parliamentary work, experts are often invited by MEPs and by Commissions to participate to public hearings, while the administration resorts to experts when the EP STAFF does not possess the expertise required in a certain area.

For experts, working with the EP represents, in addition to the financial remuneration, an opportunity to increase the competitiveness of their CV and to develop their skills by a sort of training-on-the-job. For this reason, the EP may decide to pay particular attention to the selection process of Experts by offering gender balanced working opportunities and thus widening its external impact in terms of gender sustainability.

This perspective also improves the EP efficacy, since supporting diversity among experts has the positive impact of increasing the number and the quality of information and, as a consequence, the quality of decisions as well.

FIGURE 15: EXPERTS INTERPRETERS AND EXPERTS FOR EXTERNAL POLICIES BY GENDER



For this pilot project, sets of gender disaggregated data concerning External Experts were not available.

Two only specific gender indicators were collected:

- interpreters, 75% of which are women,
- experts for external policies, that are women for 35%

confirming the horizontal gender segregation that persists in the labour market and in the educational system.

Source: Our elaboration on EP Staff interviews

Horizontal and vertical segregation for EMPLOYEES OF SERVICE PROVIDERS

As for service providers, the gender impact concerns the companies' gender diversity.

The gender analysis of the employees of service providers is important for the European Parliament at a double level: to widen the institutional level of social sustainability with respect to the business sector involved in the EP supply system, and to benefit from better services: studies and researches have demonstrated that companies that pay attention to diversity perform better and, as a consequence, also offer a better service to their customers. There are many indicators that are useful to describe specific aspects of a company's sensitiveness to gender diversity, but the two most important are also in this case vertical and horizontal gender segregation.

In this first explorative phase, no data concerning vertical gender segregation for service providers were available, while some gender considerations can be made about horizontal gender segregation.

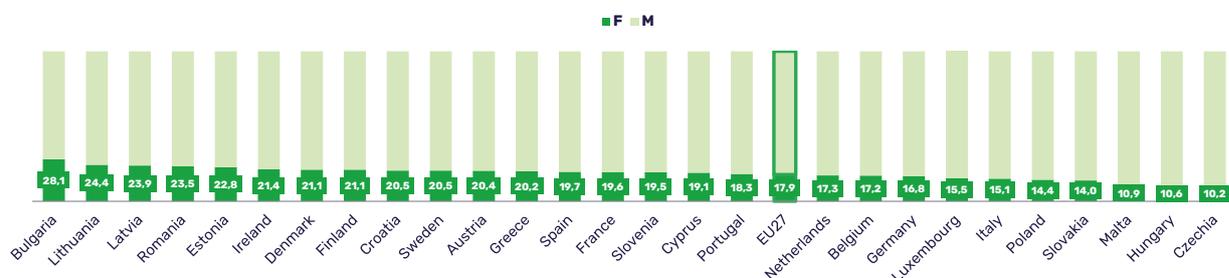
An interesting indicator in this regard was elaborated for the **EP ICT services**.

The EP provides ICT support to access information for more than 10.000 people working at the Secretariat, Political Groups and APAs (Accredited Parliamentary Assistants) as for the EP operation, and, more generally, to all the EU citizens that may access the Parliament's external information system (website, social media, ecc). The ICT support for the EP is essential to sustain the European democracy by meeting the Parliament's information needs and by providing the most digitally advanced and innovative solutions. In this general framework, gender issues concerning ICT mainly concern the digital divide.

The digital divide between men and women is due to gender stereotypes perpetuated characterize both by educational patterns about technology issues in families, and by society. As a result, it affects women not only as users, but also as students, researchers and workers.

As for workers, it is important to remember that in the EU only 17,9% of ICT specialists are women (Eurostat, 2019):

FIGURE 16: EU27 ICT SPECIALISTS BY GENDER, 2019

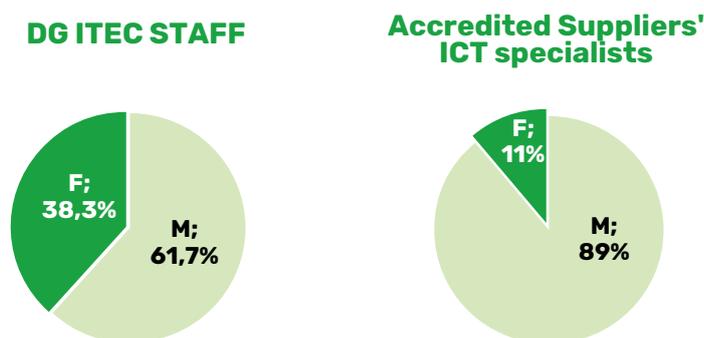


Source: Our elaboration on Eurostat, 2019

With reference to the EP, the gender digital divide may concern users (i.e. MEPs and Staff), but also service providers in terms of gender procurement.

A few gender disaggregated data concerning ICT at the EP confirm a strong gender imbalance within the staff of the Directorate-General for Innovation and Technological Support (DG ITEC), where women are 38,3%, as well as a more evident gender imbalance among the ICT specialists accredited to the EP buildings (about 500 people), where women are 11% and men 89%.

FIGURE 17: DG ITEC STAFF AND ACCREDITED SUPPLIERS' ICT SPECIALISTS



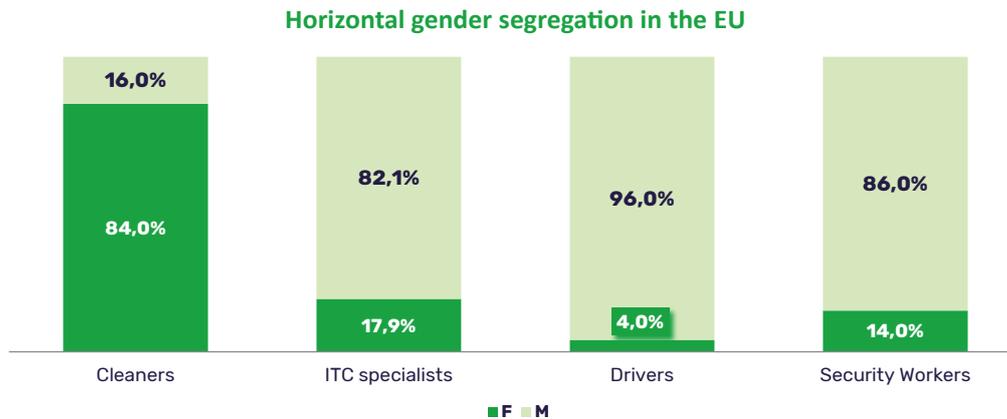
Source: Our elaboration on EP DG-ITEC data

In this respect, it is important to remember that there are gender differences also among ICT specialists: the percentage of males is even higher among hardware specialists, while females' rates increase in tasks related to administration, management and software.

Another interesting gender issue that emerged during the explorative interviews concerns **cleaning services**. Despite no specific indicators were found for the EP service providers in this case, there are few doubts that this kind of activity has a very high feminization rate: at EU27 level, the 84% of cleaners are female (Eurostat, 2018).

Considering that these kinds of jobs usually have poor working conditions, a sort of indirect and unaware gender discrimination emerged while comparing the constant recurrence to external cleaning services with the 10 years long process of internalization that has involved IT services, driver services and security services, all activities with a very high rate of male employees in the EU27: 82,1% among IT specialists (Eurostat, 2019), 96% among drivers and mobile plant operators (Eurostat, 2018), and 86% among security workers (Coess, 2015).

FIGURE 18: HORIZONTAL GENDER SEGREGATION IN THE EU FOR CLEANERS, ICT SPECIALISTS, DRIVERS AND SECURITY WORKERS



Source: Our elaboration on Eurostat and Coess data

The reasons for this process of internalization were the need to foster with the institution a higher degree of identification of certain staff workers and a precaution criterion against precarious situations, which could lead to criminality and terrorism. For these reasons, IT services, which require highly specialized skills, were internalized in an effort to retain experts by offering them good contracts and a longer career perspective. Similarly, drivers were recruited into the EP Staff for fear that, without feeling a sense of loyalty towards the EP, local companies might be exposed to criminality or even terrorism. For the same reason, security agents also became EP permanent employees after some petty crime episodes occurred inside the EP premises (bank, canteen and post office robberies), in an effort to promote a stronger sense of loyalty. As a result, men mainly profited by this internalization: 93% of drivers (73/75) and about 75-80% among the security and IT services became employees.

In the case of cleaning services, when considering that these are basic and unchanging activities, a similar internalization process could be envisaged to spare the EP from similar risks of criminality (office thefts) or even terrorism. Better working conditions for this kind of workers would improve the EP security by increasing their loyalty toward the institution, and would also achieve an improved gender balance from the perspective of EP sustainability.

Another example of horizontal segregation to be investigated concerns for example expenditures for **buildings maintenance**. The EP buildings and associated costs represent environmental expenditures that may not be directly or indirectly referred to gender analysis since they represent institutional and general costs. Nevertheless, with reference to the gender mainstreaming principle, which foresees the analysis of every budgeting item, some gender issues may be considered even in this case, like the gender impacts of these kind of expenditures to the service providers' employees, or the respect for specific gender needs in the buildings design and refurbishment.

As decided by EU member state government leaders (European Council) in 1992, the Parliament has three places of work - Strasbourg (its official seat), Brussels and Luxembourg, for a total of 27 buildings and a surface area of 1.180.131 m², besides other buildings in other member states where

the European Parliament Liaison Offices are located. Parliament owns 87.5% of its buildings (151 300 m² rented and 1 052 400 m² owned), since it was evaluated that owning buildings was cheaper than renting them.

Expenditures for buildings renovations are therefore consistent both in terms of allocated funds and in terms of people involved like building workers, entrepreneurs, architects, designers, for which a gender impact assessment and the respect for gender balance principle may be investigated.

Another issue which could be explored regarding the travelling capability concerns the analysis of F/M **car parking inside the EP buildings** versus financial support for F/M users of public transport.

Gender procurement for service providers

The EP adopts the public procurement rules that have been defined in accordance with the Regulation on the financial rules applicable to the general budget of the European Union (Regulation (EU, Euratom) No 2018/1046 (Financial Regulation)). According to this Regulation and others related to it, there are different procedures for service providers, depending on the amount of the contract: Public procurement with publication of a contract notice, negotiated procedure, and direct procurement (for contracts below 15.000€³). In any case, three main principles have always to be respected: Transparency, Proportionality and Equal treatment and non-discrimination.

The Equal treatment and non-discrimination principle has a specific and clear gender impact. The rule 96 of the 2018/1046 Financial Regulation states that: “..Procurement rules and principles applicable to public contracts awarded by Union institutions on their own account should be based on the rules set out in Directive 2014/23/EU of the European Parliament and of the Council..” (European Parliament, 2018d).

On this basis, the Directive 2014/23/EU envisages at rule 98 that: “...Contract performance conditions might also be intended to favour the implementation of measures for the promotion of equality of women and men at work, the increased participation of women in the labour market and the reconciliation of work and private life, the protection of the environment or animal welfare and, to comply in substance with fundamental International Labour Organisation (ILO) conventions, and to recruit more disadvantaged persons than are required under national legislation...” (European Parliament, 2014).

To comply with these rules, the EP administration uses a standard text regarding the policy on the promotion of equal opportunities, which should appear in all tender specifications:

3 Source: European Parliament, “Public Procurement”

<https://www.europarl.europa.eu/contracts-and-grants/en/public-procurement/>

Source: European Parliament, “Public Tendering rules”

https://europa.eu/youreurope/business/selling-in-eu/public-contracts/public-tendering-rules/index_en.htm#shortcut-0

“...Tenderers shall undertake to observe a policy on the promotion of equality and diversity in the performance of the contract, should it be awarded to them, by applying the principles of non-discrimination and equality set out in the Community Treaties in full and in their entirety. More particularly, the tenderer awarded the contract shall undertake to establish, maintain and promote an open and inclusive working environment which respects human dignity and the principles of equal opportunities, based on three main elements:

- equality between men and women;

- employment and integration of disabled persons;

the removal of all obstacles to recruitment and all potential discrimination based on sex, race or ethnic origin, religion or convictions, disability, age or sexual orientation...”

Recommendations:

Recommendations concerning Service providers concern three main areas:

1. To implement a gender disaggregated data system on experts and service providers employees and entrepreneurs for horizontal and vertical segregation

The gender indicators collected for experts confirmed the need to create an overall and transversal data base that includes all the experts involved in the EP to allow an overall gender analysis also in terms of horizontal segregation and of the kind of expert involved (for hearings, for researches, for translations, ecc). Also gender criteria for experts selection should be verified.

As for companies, a data system collecting F/M employees data as well as data about Ceos, board of directors, ownership, would be precious to monitor and verify service providers' respect for GE procurement rules. Gender statistics on security passes of F/M people attending the EP buildings for different institutional tasks and offices might also be useful.

2. To develop an in depth analysis concerning budget items

Gender disaggregated data should then be related to correspondent budget items, in order to define the gender impact in financial terms. To achieve this result budget should be split at a more detailed level than the budget items that were available in this explorative phase, in order to find a precise and clear correspondence. In this way also budget reclassification could be more precise and offer further information support for more gender sensitive decisions concerning budget and expenditures.

A specific attention could also be paid to some budget items concerning expenditures for grants, especially grants for European political parties and foundations, besides to other funds for “outside bodies” such as EP political groups, European political parties and Foundations, non-attached members, the former members' association, the EP staff committee. For these kind of expenditures a gender impact might be investigated subject to the availability of a specific accountability system

reporting on the kind of activities funded.

Other budget items should be better analysed in terms of gender impact by seeking gender disaggregated data in terms of applicants/beneficiaries/participants/ for activities like meetings and conferences, research, media and communication, training, travels (See Table 5).

TABLE 5: SERVICE PROVIDERS: EP BUDGET RECLASSIFICATION BY CAPABILITIES DETAIL BY ORDER AND BUDGET ITEM

EP BUDGET 2021 BY STAKEHOLDER: SERVICE PROVIDERS	3RD ORDER
DOING POLITICS	290.027.220
Article 3 0 2 – Reception and representation expenses	858.500
Article 3 2 0 – Acquisition of expertise	7.491.500
Article 3 2 2 – Documentation expenditure	3.216.000
Article 3 2 3 – Support for democracy and capacity-building for the parliaments of third countries	1.400.000
Article 3 2 5 – Expenditure relating to liaison offices	9.400.000
Article 4 0 0 – Current administrative expenditure and expenditure relating to the political and information activities of the political groups and non-attached Members	65.000.000
Article 4 0 2 – Funding of European political parties	46.000.000
Article 4 0 3 – Funding of European political foundations	23.000.000
Article 4 4 0 – Cost of meetings and other activities of former Members	250.000
Article 4 4 2 – Cost of meetings and other activities of the European Parliamentary Association	250.000
Article 5 0 0 – Operational expenditure of the Authority for European political parties and European political foundations	300.000
Item 1 6 5 2 – Expenditure on catering	750.000
Item 3 0 4 0 – Miscellaneous expenditure on internal meetings	300.000
Item 3 0 4 2 – Meetings, congresses, conferences and delegations	2.857.000
Item 3 2 1 0 – Expenditure on European parliamentary research services, including the library, the historical archives and scientific and technological options assessment (STOA)	8.430.000
Item 3 2 1 1 – Expenditure on the European Science-Media Hub	1.400.000
Item 3 2 4 1 – Digital and traditional publications	5.053.000
Item 3 2 4 2 – Expenditure on publication, information and participation in public events	28.420.000
Item 3 2 4 3 – European Parliament visitor centres	31.811.500
Item 3 2 4 4 – Organisation and reception of groups of visitors, Euroscola programme and invitations to opinion multipliers from third countries	33.148.470
Item 3 2 4 5 – Organisation of symposia and seminars	2.902.750
Item 3 2 4 8 – Expenditure on audiovisual information	17.553.500
Item 3 2 4 9 – Information exchanges with national parliaments	235.000
TRAVEL	37.144.000
Article 2 1 6 – Transport of Members, other persons and goods	4.599.000
Article 2 3 7 – Removals	1.860.000
Article 3 0 0 – Expenses for staff missions and duty travel between the three places of work	28.565.000
Item 3 0 4 9 – Expenditure on travel agency services	2.120.000
Communicate	56.061.421
Article 1 4 2 – External translation services	7.574.000
Item 1 4 0 5 – Expenditure on interpretation	48.487.421

EP BUDGET 2021 BY STAKEHOLDER: SERVICE PROVIDERS	3RD ORDER
INFORMATION	182.188.500
Article 2 1 4 – Technical equipment and installations	26.467.500
Item 2 1 0 0 – Computing and telecommunications – Business-as-usual operations – Operations	29.326.000
Item 2 1 0 1 – Computing and telecommunications – Business-as-usual operations – Infrastructure	30.104.000
Item 2 1 0 2 – Computing and telecommunications – Business-as-usual operations – General support for users	14.136.000
Item 2 1 0 3 – Computing and telecommunications – Business-as-usual operations – Management of ICT applications	29.821.000
Item 2 1 0 4 – Computing and telecommunications – Investment in infrastructure	20.361.000
Item 2 1 0 5 – Computing and telecommunications – Investment in projects	31.973.000
ENVIROMENT	243.887.500
Article 2 1 2 – Furniture	4.910.000
Article 2 3 0 – Stationery, office supplies and miscellaneous consumables	1.366.000
Article 2 3 8 – Other administrative expenditure	1.692.000
Article 2 3 9 – EMAS activities, including promotion, and the European Parliament’s carbon offsetting scheme	262.500
Item 2 0 0 0 – Rent	27.301.000
Item 2 0 0 7 – Construction of buildings and fitting-out of premises	96.927.000
Item 2 0 0 8 – Other specific property management arrangements	5.607.000
Item 2 0 2 2 – Building maintenance, upkeep, operation and cleaning	67.790.000
Item 2 0 2 4 – Energy consumption	17.580.000
Item 2 0 2 6 – Security and surveillance of buildings	19.530.000
Item 2 0 2 8 – Insurance	922.000
TOTAL	809.308.641

Source: Our elaboration on EP Budget 2021

3. To adopt Gender procurement rules

Despite the public procurement rules that clearly support equal opportunities and mention specific gender issues like women’s participation to labour market and reconciliation of work and private life, the explorative phase did not give evidence of follow-up procedures on the part of the EP neither aimed at verifying the evidence of this provision nor used to recognize an awarding criteria to more gender sensitive contractors. In recent years there has been a growing interest in gender procurement worldwide. Gender procurement is a strategy that foresees to support and promote a more gender equality perspective into the procurement process and the supply chain. It mainly consists in adopting gender related indicators that must be fulfilled to participate to tenders or requests for proposals, or that may adopt a rewarding criteria in the evaluation process. Some experimentation have been implemented so far, and also some international standards have been established, even if at voluntary level (SEE ANNEX1).

Conclusions

In this preliminary study, numerous technical recommendations were produced in order to offer to the EP administration a **methodological framework** and a guide to a GB analysis. These suggestions have also been experimented roughly, just to test the concrete feasibility of what is being proposed.

There is the full awareness of the **work that still has to be carried out** to achieve an effective, precise and really representative GB analysis, in terms of budget details for a better reclassification, of gender disaggregated data, of new internal procedures to design before embedding this tool permanently into the EP administration.

This first exercise of GB analysis, despite this general and partial perspective, offers in any case a glance on the **advantages** that an official and convinced commitment from the EP to this matter might offer, in terms of better conditions of work and well-being for everybody, while offering equal opportunities to grow in professional and personal capabilities.

Also advantages outlining an institution with a wide approach to sustainability including GE must be kept in due consideration.

In any case it has to be remembered that the extent of change that the GB analysis may support has always to be put in the right perspective and with proper expectations. Since the main **EP budget is based on law**, either on the Members Statute, assistants statute, staff regulation, etc. or on procurement rules laid down in the Financial Regulation, important decisions for gender-responsive budgeting would only be possible through amending the legislation in many cases.

The impossibility of gender sensitive budget changes due to due to a rigid institutional structure is therefore an objection that often arises.

As a truth, GB analysis evaluates not only the *amount* of resources spent for women and men, and their gendered impact, but also *how* the resources are spent in terms of governing rules. These two different levels of analysis are complementary: a general glance on not negotiable budget items may result in more awareness and have an impact in the medium-long term, but, at the same time, being aware of the gender gap within the overall budget strengthens politically the demands for specific and negotiable budget shifts aimed at improving the gender balance.

The evaluation on the poor changes that an institution may achieve in a budget year has, in fact, to acknowledge that **GE is an long term goal to pursue**: the Global Gender Gap Report has accounted for 54 years for Western Europe to reach parity and 107 years in Eastern Europe (WEF, 2020).

As a consequence, true and transformative changes also at the EP may demand for years to develop. For this reason it is important to analyse with the GE perspective also budget items that apparently can't be changed in the short time but that might take 3 or 10 years to be included in the EP Financial Regulation or Staff Regulation, for example.

Also in the case of the proposal for Gender procurement, there is the full awareness that it might take a big political commitment and much time to be implemented. These obstacles don't diminish in any case the importance for the EP to adopt it. Applying gender procurement rules, for example, to the ICT sector, would not allow to achieve immediately GE, but could support a progressive increase of women among ICT specialist on a year by year basis.

This medium-long term perspective takes the EP to play an active role in supporting economic and social changes over the years.

Despite the EP Budget is an administrative budget with small resources compared to the other EU Institutions and the Member States' national budgets, it refers to the only EU institution that is elected directly by the EU citizens.

This **democratic responsibility** to represent adequately all citizens, both men and women in equal share, since they are equal among electors, defines a different and more demanding role for the EP that has to lead by example to other institutions on the commitment to the GE achievement.

Furthermore, the social and economic crisis due to the pandemic and the women's crisis is now calling for a more EU institutional involvement at any level to significantly improve the efficacy and efficiency of its political and financial action in order to support gender equality as a fundamental condition to recover and accelerate economic and social growth, both at Member States and at the EU institutions themselves.

In previous years the **EP strongly committed to supporting GE, gender mainstreaming and GB** by approving a considerable set of Resolutions, Recommendations and Studies that paved the way to start with GB initiatives. The following steps due to plan, develop and implement a true GB analysis both at EP level and at EU level, considering the women's crisis that the EU is facing, need now to be undertaken as soon as possible.

On the part of the Greens/EFA, this preliminary Report is therefore meant to support the EP and EU Institutions to take **proactive action** on this matter, in the full awareness of the urgency to pursue gender equality goals with adequate tools of analysis and evaluation.

ANNEX 1: Focus on Gender Procurement

Gender procurement is a strategy that foresees to support and promote a more gender equality perspective into the procurement process and the supply chain.

It mainly consists in adopting gender related indicators that have to be fulfilled to participate to tenders or supply requests for proposals, or that may recognize a credit in the evaluation process.

Some experimentation have been implemented so far, and also some international standards have been established, even if at voluntary level, like, for example:

The GRI guidelines for embedding gender Equality in sustainability reporting:

Gender procurement in this case, from the corporations' side, means:

Extract From "Embedding gender in a sustainability reporting: a practitioner's guide (GRI&IFC, 2009)

"...Promotion of gender equality practices within the supply chain

- Publish a clear and unambiguous executive-level policy statement/position to help ensure that employees and the public are aware of the organization's support for gender equality practices in their supply chain.
- Put in place procurement policies and procedures that are gender sensitive.
- Identify mechanisms to help ensure that suppliers meet these policies and procedures in order to be eligible for procurement.
- Run supplier mentoring and training programs on gender practices and reporting.
- Seek suppliers sharing the organization's commitment to gender equality. Request from potential suppliers information on their gender policies and supplier diversity.
- Publish a list of the largest tier-1 suppliers and their gender policies.
- Request third-party audits of suppliers' gender performance data.

Promotion of supplier diversity

- Adopt a widely accepted definition for a 'women's enterprise' for the purposes of being able to effectively report on gender diversity in the supply chain.⁵⁸
- Determine the financial value and percentage of total procurement spending done by vendor, broken down by gender and type of supplier.

- Within the guidelines of the local law, analyse the existing supply chain to establish the current baseline number of first- and second-tier suppliers that meet the definition of women’s enterprises, and identify opportunities to reach out to and strengthen partnerships with women-owned and -managed businesses.
- If applicable, establish targets to raise the number of women’s enterprises within the supply chain.
- Work with a third-party organization that can help identify, verify, and certify women-owned businesses in the organization’s supply chain.
- Identify a “women’s enterprise champion” within the organization’s procurement department to keep track of supplier-diversity statistics.
- Make available to staff a list of suppliers and subcontractors that are women’s enterprises for inclusion in procurement processes (particularly during outreach at the ‘expression of interest’ stage).
- Increase transparency by making public key information about how the organization’s supply chain works, how the organization sources from vendors, what is being sourced from vendors, and, if applicable, how SMEs can register as preferred suppliers and compete for contracts.
- Create outreach initiatives, offer a supplier mentoring program, and host matchmaking events and “procurement fairs” targeting women-owned businesses to help develop their capacity to become quality suppliers.

Some indicators suggested to evaluate Gender procurement are:

Organizational objective		Measure		
		Basic	Moderate	Advanced
Supply chain	Do business with organizations that respect gender equality	Description of gender equality in procurement policy and plans	Percentage of suppliers that have gender equality policies or programs	Percentage of suppliers that report on their gender-equality policies and practices
				Gender composition of supplier workforce
	Promote women’s entrepreneurship and supplier diversity			Percentage of suppliers’ managerial posts, by gender
				Financial value and percentage of total procurement by supplier company and type of good or service, broken down by gender and type of supplier
			Percentage of suppliers’ shareholders, by gender	

...”

EIGE: mentions Gender Procurement among the recommended gender mainstreaming tools⁴ and provides best practices and examples of indicators like:

Extract from EIGE's page on Gender procurement⁵

Examples of factors that may be considered when evaluating a proposal:

- Is the proposal briefed on relevant gender issues and provided with background documentation, including literature and documentation relevant to gender equality issues and national and EU policy documents on gender equality (for example, relevant material from EIGE)?
- Is the project team gender-balanced? Do the team members have an adequate level of gender expertise?
- Does the proposal include sex-disaggregated data and gender indicators?
- How do the team members propose to measure the different impacts of activities and interventions on women and men?
- Will the views of female beneficiaries and other stakeholders, such as gender experts or women's organisations be sought?

Examples of requirements that may be included within the implementation conditions:

- Gender-balanced composition of the project team and beneficiaries;
- Balanced presence of women and men in decision-making positions;
- Specific analysis about gender-related concerns in the project and in the reports:
 - mapping of the situation of women and men in the concerned area;
 - elaboration of gender-specific objectives in line with the latest findings and with the objectives of the call;
 - explanation on how these objectives have been achieved;
- Use of sex-disaggregated data and gender indicators;
- The application of user-centred and/or participatory methodologies which take into account a gender dimension by directly involving a fair share of women in the process and by looking at how gender inequalities/differences are structuring the domains and the contexts of a particular policy area;
- Preference given to women when hiring staff in male-dominated sectors.

The European charter for equality of women and men in local life by Council of European Municipalities and Regions (CEMR)

The Charter foresees the commitment of Municipalities and Regions to adopt gender procurement rules at the Article 12:

4 Source: EIGE, <https://eige.europa.eu/gender-mainstreaming/methods-tools/gender-procurement>

5 Source: <https://eige.europa.eu/gender-mainstreaming/methods-tools/gender-procurement>

Extract:⁶ ARTICLE 12

1. The Signatory recognizes that, in carrying out its tasks and obligations in relation to public procurement, including contracts for the supply of products, the provision of services, or the execution of works, it has a responsibility to promote equality of women and men.
2. The Signatory recognizes that this responsibility is of particular significance where it proposes to contract out to another legal entity the provision of an important service to the public, for which the Signatory is by law responsible. In such cases, the Signatory will ensure that the legal entity that wins the contract (whatever its type of ownership) has the same responsibilities to ensure or promote equality of women and men as the Signatory would have had if it had provided the service directly.
3. The Signatory further undertakes to implement, wherever it considers appropriate, the following steps:
 - a. for each significant contract it proposes to enter into, to consider the relevant gender implications and the opportunities for lawfully promoting equality;
 - b. to ensure that contractual specifications take into account the gender equality objectives for the contract;
 - c. to ensure that the other contractual terms and conditions for the relevant contract take into account and reflect those objectives;
 - d. to use the power under European Union public procurement legislation to lay down performance conditions concerning social considerations;
 - e. to make its staff or advisers responsible for public procurement tasks and the letting of contracts aware of the gender equality dimension of their work, including via training for this purpose;
 - f. to ensure that the terms of a main contract include the requirement that sub-contractors should also comply with the relevant obligations to promote gender equality.

⁶ <https://charter-equality.eu/good-practices/fourniture-de-bien-et-de-services-en.html>

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