



Agentur für
Gleichstellung
im ESF

GENDER BUDGETING IN THE FEDERAL ESF – A QUALITATIVE ANALYSIS

Berlin, June 2012

Translation: January 2013

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CONTENTS

1	Introduction.....	2
1.1	Methodology.....	2
2	Results of the analysis.....	6
2.1	Programme: Business Consulting.....	7
2.2	Programme: Exist start-up culture	7
2.3	Programme: Learn to work – develop skills – the ability to innovate in an modern work environment.....	9
2.4	Programme: Job Initiative	9
2.5	Programme: Service Network for Training in Care of the Elderly	10
3	Conclusion	11
4	Sources and literature	13
4.1	Sources analysed.....	15
5	Addendum	17
5.1	Programme overview	17
5.2	Table Index	18

1 INTRODUCTION

In the federal Operational Programme (OP) of the European Social Fund (ESF), gender budgeting is applied a) in the participatory programmes as well as b) in the projects funded under Code 69 (and therefore explicitly intended as equal opportunity measures). The analysis for 2010 revealed that of the 62 programmes that were included in the monitoring system ADELE, 32 programmes indicated participation and expenditures and could therefore be incorporated into the quantitative gender budgeting in accordance with the OP. In addition, non-participatory projects that received funding under Code 69 were also included. Here an important result is that the percentage of funds that were allocated to women or to equal-opportunity-oriented projects (calculated at two-thirds) was 43,7 percent up to 2010. The target goal indicated in the OP is at least 50 percent.¹

In order not to limit the analysis to this part of the Operational Programme, the Agency for Equality within the ESF suggested a qualitative application of gender budgeting that is not concerned with the quantitative funding allocation among men and women (participation), but rather with what is expected with regards to content, namely the contribution to equality. This approach of the “Equality Portfolio” includes a classification of all funded activities according to their potential for affecting equality outcomes and the linkage of the (qualitative) classification with the implemented budget. This represents a broadening of the gender budgeting approach beyond the analysis of projects and activities based on participation. In this way, qualitative gender budgeting can advance a better representation of estimated equality for the OP as a whole. At this point it should be noted that the qualitative gender budgeting draws upon the expected equality outcomes – here, therefore, it is the potential equality outcome of programmes that is being estimated. In contrast, with quantitative gender budgeting, funding recipients were or are evaluated only in retrospect. Thus qualitative gender budgeting offers ongoing programmes the possibility to adopt a political equality orientation. For programmes already concluded in this funding period, subsequent applications offer assessments of possible equality outcomes as well as guidance for the design of follow-up programmes.

1.1 METHODOLOGY

The assessment and the ranking of the non-participatory programmes according to probable equality outcomes initially requires a classification of the expected equality outcomes:

Tab. 1: Suggested Classification: Ranking Categories and their Statistical Weight

Category	Statistical Weight Factor
Explicitly aimed at equality (G + 2)	+ 2
Probable positive equality outcome (G + 1)	+ 1
No impact on the equality situation (Initial position) (G0)	0
Negative equality outcome is possible or is to be expected (G-1)	- 1

¹ Compare Frey / Savioli / Agentur für Gleichstellung im ESF (Hg) 2011, http://www.esf-gleichstellung.de/fileadmin/data/Downloads/Aktuelles/gender-budgeting-bericht-2010_agentur_gleichstellung_esf.pdf Further results include: The percentage of funds that were allocated to women or to equality-oriented projects (calculated at two-thirds) increased by 2,3 percentage points from 2009 (41,4 percent) to 2010 (43,7 percent). At the same time, the financial volume of the projects focussed specifically on equality sank by one percentage point, from 6,2 percent to 5,2. An increase in the differences can also be observed in the per capita costs.

The content of these categories will be differentiated as follows:

Category	Criterion
Explicitly aimed at equality (G + 2)	<p><i>The following criteria are fulfilled:</i></p> <p>According to its defined goals, the programme is aimed directly at and has as its main goal the equality of women and men:</p> <p>a) in the timetable for the equality of women and men 2006-2010 and/or</p> <p>b) in the strategy for the equality of women and men 2010-2015 and/or</p> <p>c) in the NSRP and/or</p> <p>d) in the OP.</p> <p>These criteria are clearly evident in the programme goals, the guidelines and the selection criteria as well as in the public relations of the programme.</p> <p>Based on the projects eligible for funding and implementation structures of the programme, the expectation is that the goals formulated for the programme will be fulfilled.</p>
Probable positive equality outcome (G + 1)	<p><i>The following criteria are fulfilled:</i></p> <p>A concrete contribution to one or more equality goal/s with regard to target groups or subsidised content is defined.</p> <p>Selection criteria for the project contains a meaningful and functional reference to equality.</p> <p>The guidelines and the selection criteria as well as the public relations of the programme realise this objective.</p> <p>Equality/equal opportunity influence decisions concerning the selection of single projects.</p>
No impact on the equality situation (Initial position) (G0)	<p><i>The following criteria are fulfilled:</i></p> <p>The guidelines of the programmes ensure that women and men profit from the programme according to their starting positions.</p> <p>The programme documents and public relations materials make it clear that sex-related direct barriers are addressed within the framework of the programme.</p> <p>It is evident, that the programme, within its sphere of intervention, assumes neutrality with regard to sex. Equality and equal opportunity are claimed, but not actively implemented in the execution of the programme.</p>
Negative equality outcome is possible or is to be expected (G-1)	<p><i>The following criteria are fulfilled:</i></p> <p>The programme management documentation (guidelines, selection criteria) makes no reference to equality and/or equal opportunity.</p> <p>It cannot be assumed that the design of the programme and/or its criteria for funding will not pose indirect barriers to access for women.</p> <p>The public relations materials do not address equality or equal opportunity; the language and visuals used are supposedly neutral with regard to sex or portray sex-role stereotypes.</p> <p>The setting of priorities/orientation of the programme reflects the already existing segregation of the job market and could help reinforce it.</p>

By means of these four categories, the anticipated activities could be ranked according to their estimated political equality outcome on a scale of -1 to +2 and the funds apportioned to each could be correspondingly weighted. Equality-neutral projects that merely reproduce already-existing

sex-based conditions and do not contribute to equality were valued at 0 and projects that were markedly positive for equality with the factor 2.²

This method of evaluation and calculation offers a simple, intuitively comprehensible indicator according to the formula:

$$R_g = \sum_{i=1}^n V(P_i) * r(P_i) / V_g$$

By which:

- R_g = the total result of the rating of the programme in question,
- i (= 1 to n) for the index of the respective single programme incorporated into the evaluation P_i ,
- $V(i)$ for the respectively apportioned volume of funds,
- $r(i)$ for the programme-specific rating result (= respective statistical weight factor) and
- V_g for the corresponding (unweighted) total volume of the programme in question.

The formula thus determines in each case the relationship of the weighted (by means of the rating result) financial volume of a single programme P_i to the unweighted total volume of all included programmes and adds these across all programmes under examination. A value larger than 0 indicates a positive, a value under 0 indicates a negative equality outcome. The higher the funding allotment of a programme, the greater its influence on the total equality outcome, and the better the rating, the more positive the total result (and vice versa).

Comparing the sums of the funds weighted in this way with the unweighted total funds it is easy to observe whether an overall positive or negative equality outcome is to be expected. For a completely equality-neutral OP an equality outcome of zero would result; the same would be the case for an entire programme in which the funds were evenly divided between (assumedly) positive and (assumedly) negative measures.

It should be borne in mind that the present report encompasses five of a total of 24 non-participatory programmes (compare the overview in the attachment, p. 45). Of these 24 programmes, six programmes are in turn funded under Code 69 (explicitly aimed at equality). When it is assumed that these programmes fall into the category G+2, the remaining 13 programmes must be analysed in order to establish a total value for the Operational Programme.

From the criteria described above, the following questions for analysis for the evaluation of these five programmes can be derived:

- Are concrete equality goals named in the guidelines?
- Do the selection criteria refer to the equality of women and men?
- Does the programme description distinguish target groups according to sex and/or other characteristics?

² The choice to abstain from a completely symmetrical categorisation by including 'Explicitly negative for equality' with a corresponding statistical weight factor (-2) is based on the pragmatic consideration that such a category -- even when possibly warranted in isolated cases -- would practically not be used in the process of evaluation and subsidisation.

- Do supportive measures aimed at equality or equal opportunity exist or will they be established?
- Are contributions to equality or equal opportunity given concrete valuation in the selection of single projects?
- Do the public relations materials indicate that equality / equal opportunity is a goal?
- When applicable: What statements can be made about the evaluation of the cross-sectional goals of gender equality and equal opportunity?

The following sources were consulted in the analysis:

1. Programme management documentation (guidelines, selection criteria)
2. Public relations materials (flyers, websites)
3. Interview with the programme manager or other person with exact knowledge of the programme.

2 RESULTS OF THE ANALYSIS

In the first step, five programmes were selected for model analyses, so that the Operational Programme (OP) has not been completely examined up to this point. Criteria for the selection were: Various priorities, target groups, and subject matter as well as all of the responsible departments should be included, and programmes with financial endowments in the higher range as well as in the lower range should be taken into account.

The monitoring system supplied data on the volume of the programmes. Under consideration here are the actual expenditures from the beginning of 2007 (beginning of the funding period) up until the deadline for the yearly report for the funding year 2010. That is to say, it is not the funds committed but rather the actual expenditures that are included. Due to the varied durations of the analysed programmes (some of which have already ended and some of which are still running), this analysis is only an initial snapshot. A full picture is only possible when ...

- a) ... all non-participatory programmes are included in the analysis and ...
- b) ... at the end of the funding period, the actual expenditures for the entire duration of the programme can be collected.

Tab. 2: Selected Programmes for Model Analysis

Nr.	Programme	Department	PA	Subject matter	Target Group	Duration	Volume up to 2010*
1	Business Consulting	BMWi	A	business promotion / post-formation acquisition	small and medium-sized businesses	07/2008–12/2013	75.040.847 €
2	EXIST Start-Up Culture	BMWi	A	start-ups out of academia	universities/research institutes	2007-2013	10.117.062 €
3	Learn to Work - Develop Skills - The Ability to Innovate in a Modern Work Environment	BMBF	B	innovation	businesses, employees, management and labour	2006-2010	41.624.557 €
4	Initiative JOB	BMAS	C	disability	businesses and persons with disabilities	2007-2010	714.959 €
5	Service Network for Training in Care of the Elderly	BMFSFJ	C	elder care, training	managers in care facilities for the elderly	2007-2010	2.947.118 €

* **Source:** “ADELE” monitoring system, cut-off date is the yearly report for the funding year 2010.

In the following discussion, these five programmes will be examined with regard to the visibility of gender mainstreaming, and on the basis of these results, the expected equality performance will be estimated:

In the first step, each of the five programmes will be briefly introduced. The description of principal gender aspects in the funding area provides, in the second step, the basis for a later estimation of the expected equality outcome. In the third step, the most important management documents for

each of the five programmes -- programme description, guidelines, selection criteria, and also public relations materials -- will be analysed: The Information Boxes provide textual supporting documents and references that have been used to formulate the respective estimates. Information drawn from interviews will also be provided here.

At the end of each chapter, these partial estimates will be consolidated in a conclusion.

2.1 PROGRAMME: BUSINESS CONSULTING

The goal of the programme Business Consulting is to create a systems of incentives by which a small or medium-sized business (KMU) or self-employed person can “make use of external know-how. The goal is to improve the performance and competitive ability of medium-sized businesses and to facilitate their ability to adapt to economic changes. Funding will support counselling in all questions relating to management, work and environmental protection, the implementation of family-friendly programmes in the company as well as for entrepreneurs.”³

Target groups are the existing KMU of the business economy as well as self-employed professionals.

To define business owners with migration background as a special target group makes sense in consideration of the equality situation in the funding area (see chapter above, “Principal Gender Aspects in the Funding Area”). Through the programme it becomes apparent that a political equality-oriented setting of priorities and management is possible and meaningful also in the field of business promotion. In this way, the programme distinguishes itself positively, in terms of having an active equality strategy, from other programmes in which a more sex-neutral approach is taken. Due to the specific appeal to and concrete encouragement for women, an positive equality outcome can be clearly expected overall.

2.2 PROGRAMME: EXIST START-UP CULTURE

The programme is linked to the programme “EXIST Start-up Stipend”. This programme awards stipends to single persons or research teams. On the basis of the participatory element, the programme was included in ESF monitoring. The gender budgeting report on the funding year 2010 revealed a percentage of women of 14,9 percent and a percentage of the programme expenditures of 16 percent.

By this means, the programme “Start-Up Culture” supports universities and their respective activities in order to promote start-ups out of the university. The projects in question “should support entrepreneurial self-employment out of universities that endorse entrepreneurship as an alternative career path.”⁴

“EXIST Start-Up Culture is conducted in the form of a competition, the “Entrepreneur University.” The goal is to develop a university-wide overall strategy and to put this into action in order to establish an entrepreneurial culture and more entrepreneurial spirit at universities. Moreover, the

³ European Social Fund (ESF)
http://www.esf.de/portal/generator/784/programm_unternehmensberatung_bafa.html (14.01.2013).

⁴ Compare ESF (no year): EXIST: Selection criteria,
http://www.esf.de/portal/generator/13398/property=data/2010_03_30_auswahlkriterien_gruenderhochschule.pdf (14.01.2013).

start-up funding should be carried over from a project funding with time and content limitations into a permanent strategic task”.⁵

“Private and public universities in Germany will be funded in the development and implementation of a complete entrepreneurial strategy. Cooperation partners could be involved in the funding in the form of subcontracting agreements”.⁶

Both programmes are targeted in their presentation and their orientation more at technology-related start-ups, that is, at scientific and technical subjects.

With the exception of the selection criteria, none of the analysed documents contained an explicit reference to the equality of men and women. No attempt is made to realise equality or equal opportunity goals.

In the programme selection criteria for the programme EXIST Start-Up Culture -- The Entrepreneur University, an “increase in the number of technology-oriented business start-ups” is named as a contribution to the achievement of specific goals of the Operational Programme. Social science- and humanities-related start-ups are not explicitly named as a funding target. As men currently tend to select technical subjects more frequently and women more often the social science- and humanities-related subjects, it is probable that more men will profit from the funding offered through the EXIST Start-Up Culture programme. In considering the gender aspects with regard to the number of students and graduates in technical subject groups and the percentages of men and women in start-ups as a whole, funding that is gender-sensitive and above all specifically aimed at women would be advisable, particularly as women in the target subcategory of academics and entrepreneurs in the services sector actually show an above-average entrepreneurial tendency.

Equal opportunity is also not addressed in the public relations work of the programme or programme network. The selection of examples, of disciplines as well as persons, rather serves to convey a male-dominated picture of the start-up scene at the universities. In terms of language, the websites of the programme identify women and men as target groups of the programme; this, however, is not consistently the case.

The interview also bore out the impression that equality as a cross-sectional objective in the programme is not followed precisely or systematically. At most, the optional focus of some projects on the more narrow theme of “Combining Career and Family” could effect a positive equality outcome to some degree.

As the selection criteria of the programme EXIST Start-Up Culture allows for women-specific funding as a possibility, and as the starting points of women and men are otherwise assumed to be unequal in the start-up context (compare the analysis of the selection criteria), a reproduction of the starting situation is to be expected here. The orientation of the programme in the way it is carried out or in its public relations materials shows a definite male-dominated picture of the start-up scene at universities. Therefore a negative equality outcome cannot be ruled out here.

⁵ Compare ESF (no year): EXIST. Programmbeschreibung, http://www.esf.de/portal/generator/752/programm_exist_gruendungskultur.html (14.01.2013).

⁶ ebd.

2.3 PROGRAMME: LEARN TO WORK – DEVELOP SKILLS – THE ABILITY TO INNOVATE IN AN MODERN WORK ENVIRONMENT

The programme is located in the area of research and development. In addition to universities, large companies, small and medium companies (KMU), public services and other institutions are also funded. Thematically, the programme is focussed on staff, organisational, and skill development.

In the guidelines, selection criteria, programme description, and public relations work, equal opportunity is understood chiefly in the sense of the cross-sectional goal of equal opportunity and a diversity approach. Using this approach, the equality of women and men or gender mainstreaming is reflected in many ways in the guidelines, the selection criteria and the public relations materials. This has the positive result that sex is often referred to in combination with other categories, often, for example, with age. To what extent the diversity management approach represented here incorporates the strategy of gender mainstreaming is, however, not clear. With regard to the content of the programme, for instance the support of organisational and staff development or skills development, a stronger focus on the equality of women and men would be desirable. The programme's spheres of activity have definite connections to gender topics. This political equality potential has been barely exploited. Above all, in the context of the selection, it is not at all certain that the gender aspects of the topic in question are sufficiently considered. Equal opportunity and equality are defined merely as desirable targets, and gender competence does not constitute a criteria in the scientific evaluations. Responsibility for addressing these topics has also not been established. Equal opportunity is viewed, furthermore, as an element extrinsic to science, instead of being promoted as a strategic quality management tool to maximise the use of all available talent. The programme documents clearly indicate an outcome supportive of equality -- particularly due to the high potential for equality in the thematic focus of the programme. Equal opportunity is not, however, sufficiently ensured in the concrete design and implementation of the programme. For this reason, it can be assumed that the existing equality situation will be reproduced.

2.4 PROGRAMME: JOB INITIATIVE

Up to 2010 the programme supported model projects that specialised in the integration of people with disabilities into the job market.

The programme supported projects that aim to improve the working conditions for people with disabilities. Thus the target group was not people with disabilities, but above all businesses and job training facilities. The programme served to “support a measurable improvement in access to a working life on the open job market for people with disabilities and severe disabilities”.⁷

While practically no mention is made of the topic of equal opportunity and/or equality of women and men in the public relations materials and the programme description, the guidelines and the selection criteria suggest that a positive equality outcome can be expected: Keeping in mind the chapter “Principal Gender Aspects in Funding Areas”, reinforcing the goal of integrating women with disabilities into the job market seems appropriate. Additionally, the goals with regard to, for example, the selection criteria or evaluation, were carried out in a meaningful way. As it can be clearly established that the programme documentation is supportive and equality objectives are

⁷ ESF (no year): Programme description: Initiative JOB, http://www.esf.de/portal/generator/812/programm_initiative_job.html (14.01.2013).

being actively pursued in the implementation of the programme, a positive equality outcome can be expected.

2.5 PROGRAMME: SERVICE NETWORK FOR TRAINING IN CARE OF THE ELDERLY

“The Service Network should enhance the training skills of managers in the facilities and educate about the importance and structure of the training. In addition it offers individual counselling about creating trainee positions. The growth of network structures among training facilities will also be supported and strategies for the establishment of trainee positions will be developed.”⁸

Target groups are “outpatient and residential care facilities, homes and other facilities that are authorised to train according to the Law for the Care of the Elderly”.⁹

The guidelines and programme description contain no reference to the topic of equality and/or equal opportunity for women and men. These documents lead one to surmise that the present equality situation will be reproduced rather than advanced. The goal formulated in the selection criteria, that of giving women and men equal chances of obtaining a qualified training, should benefit female aides in the care industry in particular. This could constitute a contribution to an occupation with an adequate income as defined by the Operational Programme. During the selection process, the offerings are also examined with regard to the importance placed on gender mainstreaming, which leads one to expect a positive equality outcome. Not least because the programme enhances the status of a career field dominated by women.

⁸ ESF (no year): Service Network for Training in Care of the Elderly, http://www.esf.de/portal/generator/824/programm_servicenetwerk_altenpflegeausbildung.html (14.01.2013).

⁹ ebd.

3 CONCLUSION

For the five qualitatively evaluated programmes examined so far, no unified picture emerges. The analysis shows that the potential for a equality-oriented management also exists for non-participatory programmes, indeed even in branches which seem to have no or a small gender dimension (for example, in the programme Business Consulting).

It is also apparent that the readiness of persons in managing positions to make a contribution to equality in their funding area, and the gender competence already at hand, accounts in large part for the equality orientation. Even where the relevant documents made no reference to equality and equal opportunity, a contribution to the equality of women and men is possible through the relevant selection of staff and a systematic follow-up on equality as a component of ESF funding.

In order to ascertain the equality indicator as it was described in Chapter 2.1, the volumes of the five programmes with respect to the monitoring data up to the end of 2010 will be reflected, each with the estimate of the equality outcome of the programme (G-value), in the following section. The formula detailed in Chapter 2.1 will be used for this purpose.

This produces the following result, that altogether only about half of the programmes (measured according to their financial volume) under observation in this case promote equality. This can be traced back in large part to the substantial financial contribution from programme “P3”, which was graded at “0”, but which accounted for almost a third of the funding under consideration. The programme “P2”, graded at a “-1”, is weighted much less heavily in the balance, since it accounts for only 10 percent of the total funding. The remaining programmes graded with “+1” contribute in proportion to their respective total financial volumes.

Tab. 3: Synopsis of the Results and Total Rating of the five analysed Programmes

Nr. (:= i)	Programme (:= Pi)	Duration	Volumes up to 2010* (:= V (Pi))	Equality Outcome (:= r(Pi))	Weighted Volume := V (Pi)*r(Pi) (Column E * F)	Individual Relative Contributions (= E * F / E 8)
1	Business Consulting	07/2008-12/2013	75.040.847	1	75.040.847,00 €	0,575270113
2	Exist start-up culture	2007-2013	10.117.062	-1	-10.117.062,00 €	-0,077558338
3	Learn to work - develop skills - the ability to innovate in a modern work environment	2006-2010	41.624.557	0	0,00 €	0,000000000
4	Job Initiative	2007-2010	714.959	1	714.959,00 €	0,005480942
5	Service Network for Training in Care of the Elderly	2007-2010	2.947.118	1	2.947.118,00 €	0,022592881
Total sum			130.444.543		68.585.862,00 €	
Total rating result (rounded)					0,53	0,53

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5 ADDENDUM

5.1 PROGRAMME OVERVIEW

The following programmes have no participation component and were therefore not included in the quantitative gender budgeting. They should therefore be incorporated into the portfolio analysis:

PA	Lf. Nr.	Programme Description	G-Value	Volume	Percentage of Total Volume
B	1	Academics Qualify for the Job Market (AQUA)			
B	2	Learn to Work – Develop Skills – The Ability to Innovate in a Modern Work Environment			
B	3	Support Programme of the Investment Programme Future Education and Mentorship (IZBB)			
C	4	Federal Initiative for the Equality of Women in Business	G+2		
C	5	Experience is the Future - An Initiative for the Demographic Shift			
C	6	Success Factor Family	G+2		
A	7	EXIST Start-Up Culture			
C	8	Women at the Top	G+2		
C	9	Girls Day and New Paths for Boys	G+2		
C	10	Initiative JOB – Jobs Without Barriers			
C	11	Initiative Local Alliances for Families	G+2		
A	12	Innovative Single Projects BMAS Prio. A			
C	13	Innovative Single Projects BMAS Prio. C			
B	14	JOBSTARTER – Train for the Future			
B	15	Jobstarter Connect			
B	16	Learn On-Site			
B	17	Custom-fit Placement of Trainees with Training Companies			
B	18	Perspective Training Qualification			
C	19	Power for Women Entrepreneurs	G+2		
B	20	Professionalisation of Teaching Staff in the Area of Early Childhood Education			
C	21	Service Network for Training in Care of the Elderly			
A	22	Business Consulting			
A	23	Continuing Education: Promotion of Professional Development of Employees			
B	24	Continuing Education in Research: Challenge of Life-Long Scientific Qualification			

It should thereby be observed that there are also “Mixed Programmes”, which have elements with and without participation components (for example, Continuing Education). It should also be noted, that the “G+2” Programmes listed according to volume are already included in the quantitative gender budgeting, so that here an intersection between qualitative and quantitative gender budgeting exists.

Programmes marked in yellow were analysed in the present report. Programmes without a participation component, marked in blue, were advised by the Agency for Equality within the ESF.

5.2 TABLE INDEX

Tab. 1: Suggested Classification: Ranking Categories and their Statistical Weight.....2

Tab. 2: Selected Programmes for Model Analysis..... 6

Tab. 3: Synopsis of the Results and Total Rating of the five analysed Programmes 12

Impressum

Published by the Agency for Gender Equality within the ESF
On behalf of the Federal Ministry of Work and Social Affairs

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Berlin, June 2012

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