



GENDER EQUALITY, INTERSECTIONALITY AND PUBLIC POLICY

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Learning Goals

To learn about the responses that public authorities are implementing to combat gender inequality and the main instruments to measure such inequalities.

To learn how to address intersectionality related public policy issues

To learn what GE policies, GE plans and GB are, what they consist of, as well as what gender impact assessment is and how it is carried out.

INTRODUCTION

Key literature

Hervías Parejo, V., Radulović, B (2023). Public Policies on Gender Equality. In: Vujadinović, D, Fröhlich, M, Giegerich, T. (eds) Gender-Competent Legal Education. Springer Textbooks in Law Springer, Cham

Profeta P (2020) Gender equality and public policy. measuring progress in Europe. Cambridge University Press, Cambridge

Public Policy

Public policy is often defined as a course of government action (or inaction) in response to specific public (societal) problems.

Public policy as a result of a political process may take the form of a law, regulation, government decision, strategy, program or other policy documents that aim to achieve specific societal goals or resolve public problems.

Traditionally, government policy and legislation have been viewed as gender-neutral and value-free instruments on the assumption that the formulation and implementation of public policy measures benefit all members of the public equally.

Gender inequality and intersectionality

Gender inequality is perceived as a substantial and persistent societal problem, especially evident in economic, educational and political representation, health gaps, and discrimination against women or LGBTQIA+ population.

Including intersectionality in public policy involves recognizing and addressing the ways in which different forms of discrimination and disadvantage intersect to affect individuals and communities.

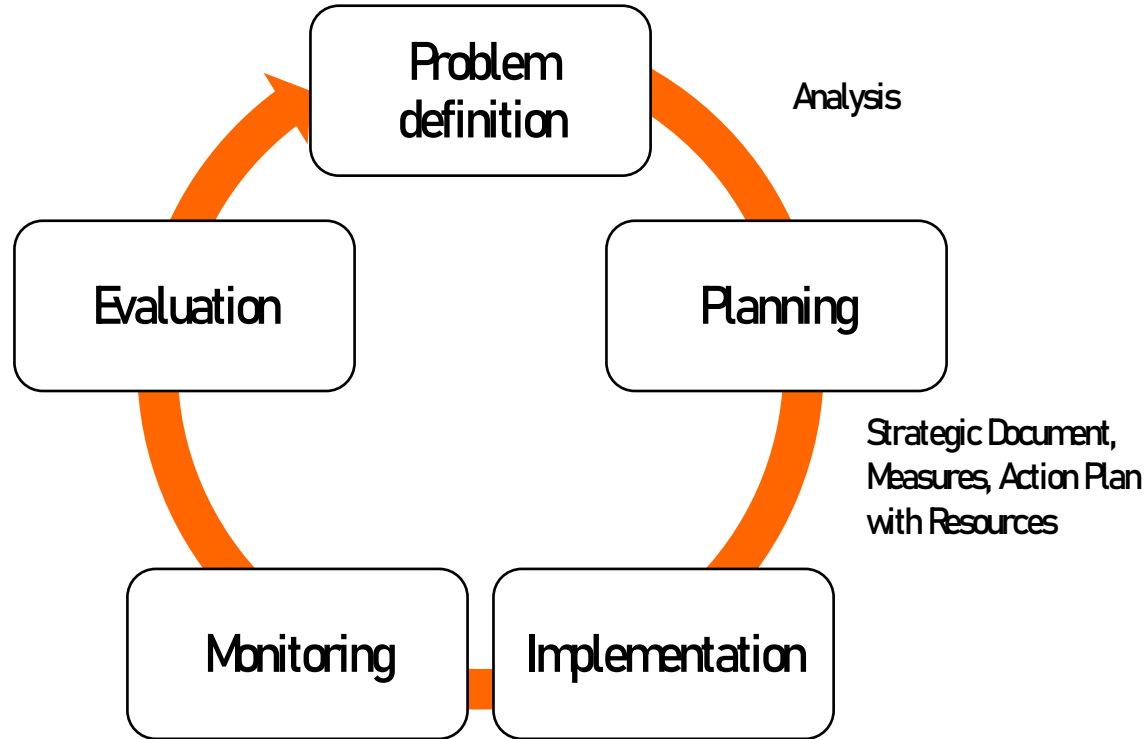
Relatively recent phenomenon.

- Despite some advances, the placement of gender equality on the top of policymakers' agenda did not materialize until recently

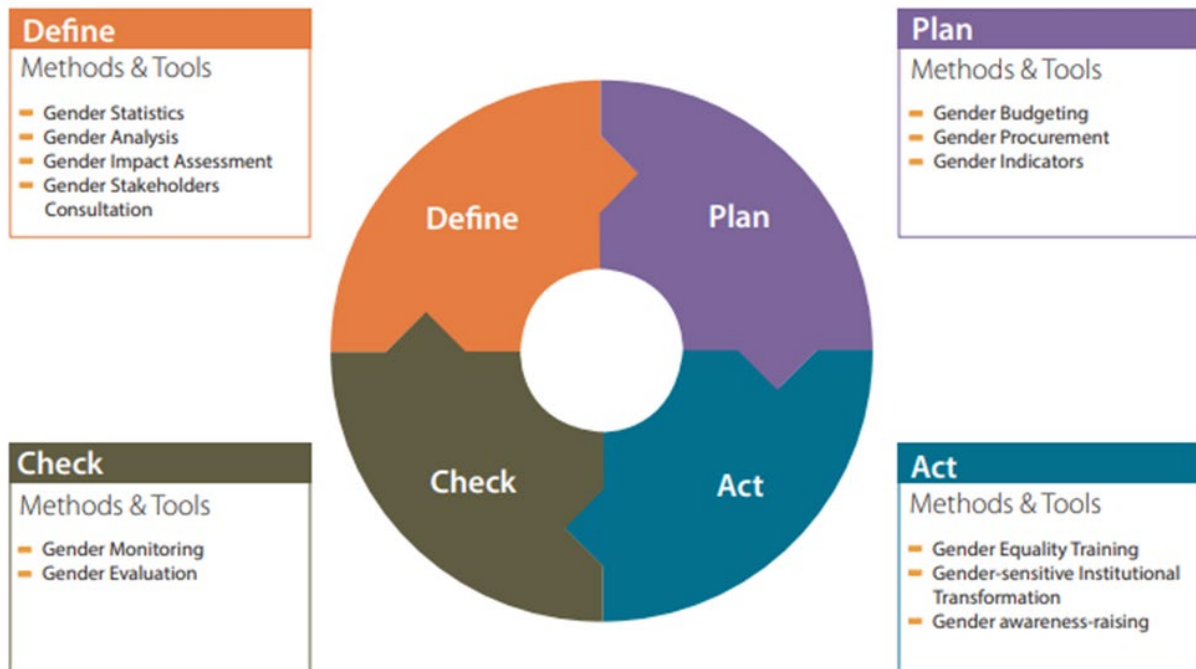
Public policy process

In each stage of policy process policymakers take into account gender equality issues and objectives: problem definition and agenda setting; policy measures formulation and adoption; policy implementation, and policy evaluation that may lead to termination or modification.

Public policy cycle



GE and Public Policy Cycle



Importance – It is not going away!

Research has shown that greater gender equality, particularly in education and employment, positively influences long-term economic growth and development.

- This is particularly relevant for the less developed and developing countries, where women still face substantial barriers to the formal labour market, do not have equal opportunities to get higher education, and are less likely to occupy managerial or administrative positions.

Why GE Public Policies are needed?

Economic growth and changes associated with economic development are not sufficient to eradicate gender inequality.

- There is no solid empirical support for the opposite effect.
- Formal and informal institutions often prevent gender equality, even in the face of economic advancement.
- By constraining women's empowerment and participation in the labour force and/or access to resources, gender inequality is cemented and will not easily be changed in the course of development.

The decrease of gender inequality is neither inevitable nor precipitous and public policies are needed to promote gender equality.

Case Study

Despite socio-economic developments, women in the EU still face pay inequality and persistent gender discrimination.

In 2019 **the gender employment gap** (the difference between the employment rates of men and women aged 20 to 64) was 11.5%. Similarly, **the gender pay gap** for 2019 in the EU stands at 14.1%, only narrowing slightly over the last decade.

The pay gap results from various factors: the presence of women in relatively low-paying sectors; differences in work-balance choices; the existence of the 'glass ceiling', and discrimination in professions and organizations.

How big is the gender pay gap in your country?

Case Study

The United Nations has repeatedly invited governments and other social agents to integrate a gender perspective in their legislation, policies, plans, programs, and projects. For example, in all of the recently-developed **Sustainable Development Goals (SDG) 5**, women have a critical role to play, with many specific objectives dedicated to women's equality and empowerment.

SDG 5- Achieving gender equality and empowering all women and girls

Check SDG gender related indicators for your country

<https://unstats.un.org/sdgs/dataportal/countryprofiles/SRB#goal-5>

The scope and size of the problem – Measuring Gender Inequality

Gender inequality is a multidimensional issue, and no single measurement or indicator can capture its entirety.

Composite Indexes

- The validity of these aggregate indices has been often criticized.

Single dimension measurement (examples)

- Economic Indicators: gender wage gap, labor force participation rates, unemployment rates, and the gender composition of different occupations and industries.
- Educational Attainment
- Political Representation
- Gender-Based Violence

Measuring Gender Inequality

Policies, as well as academic literature on cross-national and individual country gender inequalities, usually draw on data from several international organizations.

The UNDP Human Development Report,

The UN World's Women surveys,

The OECD Gender, Institutions and Development Data Base (GID-DB),

The World Bank's gender statistics database—GenderStats.

Gender Statistics

Evidence based GE policies should be based on

- comprehensive collection of sex-disaggregated data
- statistical evidence on the impact and progress towards gender equality

<https://eige.europa.eu/gender-statistics/dgs>

The Gender-Equality Index (GEI)

The European Union (EU) uses the Gender Equality Index (GEI) as a comprehensive measurement tool to assess gender equality in various domains of life.

GEI developed by the European Institute for Gender Equality (EIGE) shows the areas that need improvement and aims to support policymakers to design more effective gender equality measures. GEI examines how disability, age, education, country of origin, and family type intersect with gender to result in different outcomes.

In the EU, GEI has increased rather slowly from 63.8 in 2010 to 67.9 in 2020.

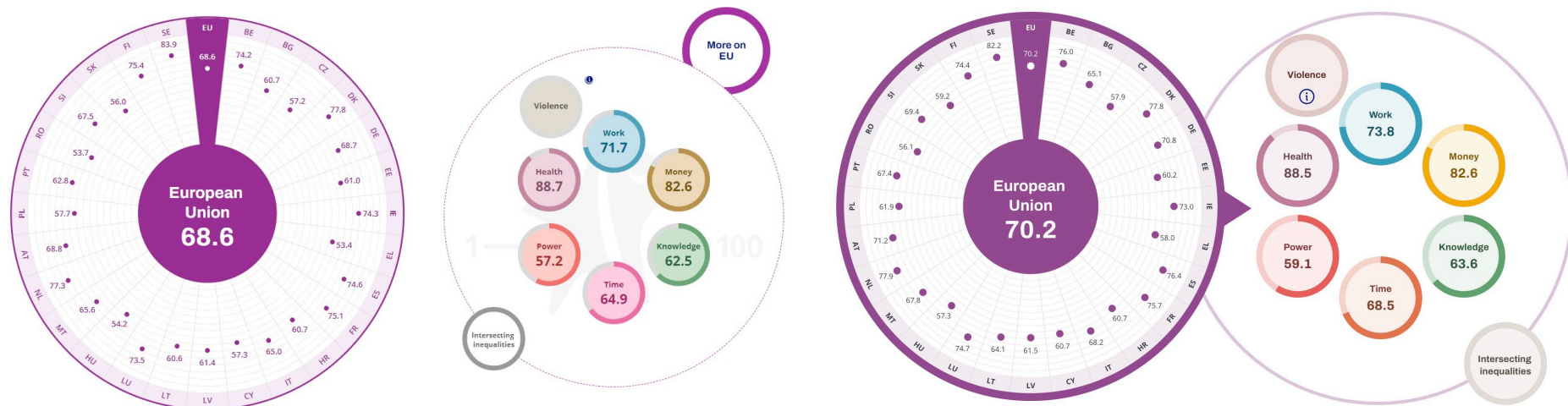
The Gender-Equality Index (GEI)

It measures gender equality using a multidimensional approach, taking into account various factors such as work, money, knowledge, time, power, health, and intersecting inequalities.

Each of these domains is further divided into specific indicators and sub-indicators that capture different aspects of gender equality.

The GEI assigns scores ranging from 1 to 100, with 1 representing total gender inequality and 100 representing full gender equality.

Exercise Comapre 2022 and 2023



<https://eige.europa.eu/gender-equality-index/2023>

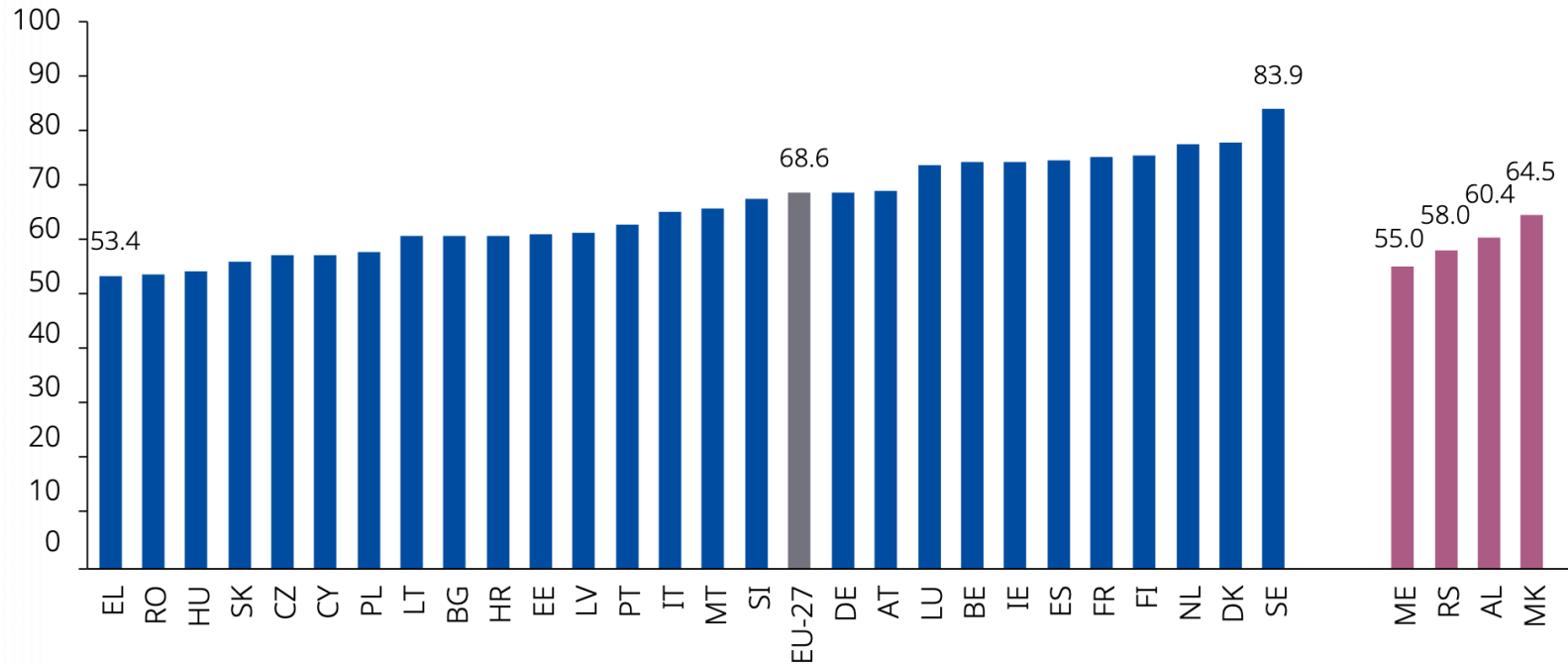
GE Serbia

Serbia's Index score 2021 is 58.0 points, which shows continuous, albeit slow progress in improving gender equality.

The country's score has increased by 5.6 points since 2014, but remains below the EU average of 67.9 (EU Index edition 2020).

Serbia has made the most progress in the domain of power, which has increased by a spectacular 18.5 points since the country started measuring gender equality. If progress continues at this pace, there will be full equality in the domain of power within 2.5 years. The progress in other domains was slower

Figure 3. Gender Equality Index for the Western Balkans and EU-27 (2022)

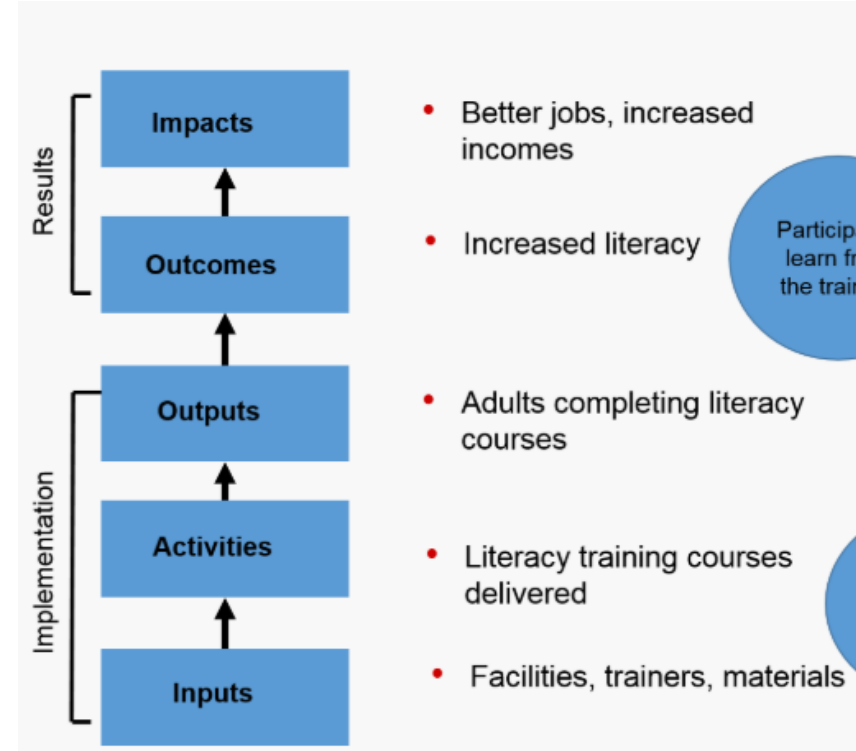


Note: EU Gender Equality Index: EIGE's calculations, data mostly from 2020; Western Balkan countries calculations: data mostly pertains to: Albania (2018), Montenegro (2017), North Macedonia (2019) and Serbia (2018).

Theory of Change

A Theory of Change (ToC) is a comprehensive description and illustration of how and why a desired change is expected to happen in a particular context.

It outlines the step-by-step process that leads from specific **inputs** and **activities** to the anticipated **outputs**, and intermediate, and long-term **outcomes**, including the assumptions and risks involved.



PP example: Improving Access to STEM Education for Girls

This policy aims to address the gender gap in STEM fields, where women are significantly underrepresented.

What measures you would propose?

Scholarship Program Scholarships for girls from low-income families to enroll in STEM courses.

Mentorship and Role Models Establishing mentorship programs connecting female STEM professionals with students.

STEM Clubs After-school STEM clubs for girls in secondary schools.

Curriculum Reforms Gender-sensitive curriculum reforms to encourage girls' interest in STEM from primary school.

Teacher Training Professional development for teachers to promote gender equality in the classroom.

Awareness Campaigns Public awareness campaigns to challenge stereotypes and promote STEM careers for girls.

Outputs

- **Scholarships Awarded:** Number of scholarships provided to girls.
- **Mentorship Programs:** Number of mentorship programs established and participating students.
- **STEM Clubs:** Number of STEM clubs established and participating students.
- **Revised Curriculum:** New gender-sensitive curriculum implemented.
- **Trained Teachers:** Number of teachers trained in gender-sensitive teaching practices.
- **Awareness Campaigns:** Number of campaigns conducted and audience reach.

Sequencing of Theory of Change

1.Inputs (Funding, Human Resources, Infrastructure, Partnerships) ↓

2.Activities (Scholarship Program, Mentorship, STEM Clubs, Curriculum Reforms, Teacher Training, Awareness Campaigns) ↓

3.Outputs (Scholarships Awarded, Mentorship Programs, STEM Clubs, Revised Curriculum, Trained Teachers, Awareness Campaigns) ↓

4.Outcomes (Increased Enrollment, Enhanced Interest, Improved Teaching, Public Perception) ↓

5.Impact (Career Entry, Economic Empowerment, Gender Equality, Societal Change)

Intersectionality (economists' perspective)

Intersectionality = Complexities of economic disparities and outcomes

Researchers disaggregate data by various demographic factors such as race, gender, age, and socioeconomic status.

Economists use multivariate regression models to examine how different factors interact and contribute to economic disparities.

This approach helps to isolate the effects of intersecting identities on economic outcomes such as income, employment, and education or race.

How do gender, disability status, and educational attainment interact to affect labour force participation rates?

Dependent Variable: Labor force participation (binary. 1 if participating, 0 if not)

Independent Variables: Gender (male, female), Disability status (disabled, non-disabled), Education level (high school, some college, bachelor's degree, advanced degree), Age, Marital status, Number of children, Region,

LFP is a function of gender, disability, education, age, marital_status, num_children, location, gender*disability, gender*education, disability*education

In this model, the interaction terms (e.g., gender*disability, gender*education, disability*education) allow us to examine how the combined effects of gender, disability, and education impact labor force participation, beyond the individual effects.

Main Effects: Assess the individual impact of gender, disability status, and education on labor force participation, controlling for other variables.

Interaction Effects: Evaluate the significance and magnitude of the interaction terms to understand how being in multiple disadvantaged categories (e.g., disabled female with low education) impacts labor force participation differently than being in a single disadvantaged category.

RESULTS (EXAMPLE)

- **Gender:** Females are 12% less likely to participate in the labor force than males.
- **Disability:** Disabled individuals are 20% less likely to participate in the labor force than non-disabled individuals.
- **Education:** Individuals with only a high school education are 15% less likely to participate in the labor force compared to those with a bachelor's degree.
- **Intersectionality:** Disabled females are 30% less likely to participate in the labor force than non-disabled males, suggesting an additional barrier beyond the individual effects.
- Females with only a high school education are 25% less likely to participate than males with a bachelor's degree.
- Disabled individuals with only a high school education are 35% less likely to participate than non-disabled individuals with a bachelor's degree.

Key steps to effectively incorporate intersectionality in public policy

- Comprehensive Data Collection
- Stakeholder Engagement
- Intersectional Analysis
- Policy Design and Implementation
- Capacity Building
- Changing Legal, Regulatory or Policy Framework
- Monitoring and Evaluation



PUBLIC POLICIES AND GENDER MAINSTREAMING

How to incorporate GE issues in public policies

Gender mainstreaming:

- integrating a gender perspective throughout the policy cycle.

Gender-responsive budgeting:

- analyzing the budgetary allocations and expenditures and ensure that budgetary decisions contribute to gender equality objectives.

How to incorporate GE issues in public policies

Anti-discrimination laws and policies:

- equal access to employment, education, healthcare, and other services, and provide mechanisms to address gender-based discrimination and harassment.

Affirmative action and quotas:

- quotas for political representation or reserved positions in educational institutions and the workforce.

Gender-sensitive sectoral policies (see Profeta 2020)

Gender mainstreaming

Gender mainstreaming is the process of assessing the implications of policies and programs on different genders and integrating a gender perspective throughout the policy cycle.

GM involves analyzing how policies impact men, women, and other gender identities differently and making necessary adjustments to promote equality.

GM aims to ensure that policies and programs are inclusive, promote equal opportunities, and address the specific needs and priorities of all individuals, irrespective of their gender.

Implementing GM

Whole-of- government strategic plan for implementing gender

Institutional mechanisms for gender equality and mainstreaming

Assessment of gender impacts of various public governance

Integration of the gender perspective in all phases of the budget

Accountability for gender equality and mainstreaming

Measuring progress towards gender equality performance

Complaint and appeal mechanisms to protect rights for gender equality

Institutional framework

A strong institutional framework and solid mechanisms whereby institutions are available and equipped for promoting gender equality in an effective and coordinated manner

Setting a rationale, action plans, priorities, timelines, objectives, expected outcomes and/or targets, and effective policy planning across public institutions for promoting gender equality

Usually some kind of a strategic document – Strategy, Programme, Plan, ...

WHOLE-OF-GOVERNMENT STRATEGIC PLAN FOR GENDER EQUALITY

Government has a clear vision for gender equality that is anchored in key government documents

Government has made a clear assessment of where it stands in relation to its goals for gender equality and which interventions are necessary to achieve its vision

Government has a results-oriented strategic plan to achieve its gender equality vision that is endorsed by senior leadership, and developed through a broad consultation with governmental and non-governmental stakeholder

GM – Where the Country stands

A sound knowledge base and analysis of where the country stands in terms of gender equality are crucial for defining gender equality objectives, designing a strategic plan, setting policy priorities and sequencing, and measuring their potential impact.

Case Study – Key Government Document

Serbian Gender Equality Strategy for the period from 2021 to 2030

Context & Situational Analysis – Problems and Issues

Vision and Goals

Measures and Actions (Action Plan)

<http://www.pravno-informacioni-sistem.rs/SGlasnikPortal/eli/rep/sgrs/vlada/strategija/2021/103/1>

But gender perspective included in other strategic documents

Exercise

Find key goals of EUGE Strategy

<https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52020D00152>

Exercise

Find the key GE strategic document in your country

- What are key GE related problems?
- What are key goals of the strategy?
- How the progress will be measured
- How many measures and activities are envisaged?

Institutional Framework

Roles and responsibilities to implement gender equality and mainstreaming are clearly assigned across the government

Government has an institution for gender equality with an adequate level of responsibility and position within the governmental structure

All government institutions are equipped and responsible for integrating gender equality in their policy-making processes and programmes

Gender equality initiatives are effectively coordinated across institutions at different levels of government

Institutional Framework

Locate central gender equality institution within the highest possible level of government (e.g. Cabinet level) to ensure it has visibility and authority to coordinate and monitor government-wide gender equality strategic plan;

Establish clear mandate, resources and capacity within central gender equality institution to deliver as expected;

Assess whether available resources (e.g., time, staff, budget, skill sets, equipment, training, etc.) are adequate to effectively execute its mandate, strategic goals and work plans;

Ensure that central gender equality institutions are staffed with expertise in policy, analysis, advocacy, communication and monitoring to implement their mandates.

Who should be responsible?

All government institutions are responsible and accountable for integrating gender equality in their policy making processes and programmes

Gender equality and mainstreaming support mechanisms (e.g. gender focal points, gender units, gender advisors) can help government institutions fulfil their responsibilities

Clearly demarcate responsibilities between providing support for internal gender mainstreaming (e.g., in human resources management) and gender mainstreaming at the policy level (e.g., in policies, budgets, services);

Coordination

Since gender equality work spans a range of policy areas, mechanisms are needed to coordinate this work.

They can involve a broad array of stakeholders and levels of engagement (e.g. senior management across government institutions, gender focal points, advisory councils, gender ombuds, committees and working groups)

Case Study

Government of Republic of Serbia - Ministry for Human and Minority Rights and Social Dialogue

GE Council

Find who is responsible for GM in your country

Evidence-based decision making and tools

Integrate evidence-based assessments of gender impacts and considerations into various dimensions of public and at early stages of all phases of the policy cycle (for example, by aligning ex ante assessments of gender impacts with broader government-wide policy development processes, such as regulatory impact assessment), as appropriate

GEA, GE Budgeting and GEP

GE Impact Assessment

Gender (equality) impact assessment has been defined as an ex-ante evaluation, analysis, or assessment of a law, policy, or program that makes it possible to identify, in a preventative way, the likelihood of a given decision having negative consequences for the state of gender equality.

Does a law, policy or program reduce, maintain or increase gender inequalities?

GA

A requirement for the implementation of GIAs is in place as part of a policy document (law, strategy, action plan); Require all draft laws and regulations to have a statement on gender impacts;

A guiding framework (guidelines, approach, methodology, etc.) for GIA implementation is in place and publicised across most diverse government actors;

A formal indication of roles and responsibilities for GIA and the creation of an accountability system;

Incorporate GIAs ex ante (before the proposed law or policy has been approved or gone into effect) and ex post (following implementation and during the impact evaluation), to assess whether the intended outcomes were achieved;

When?

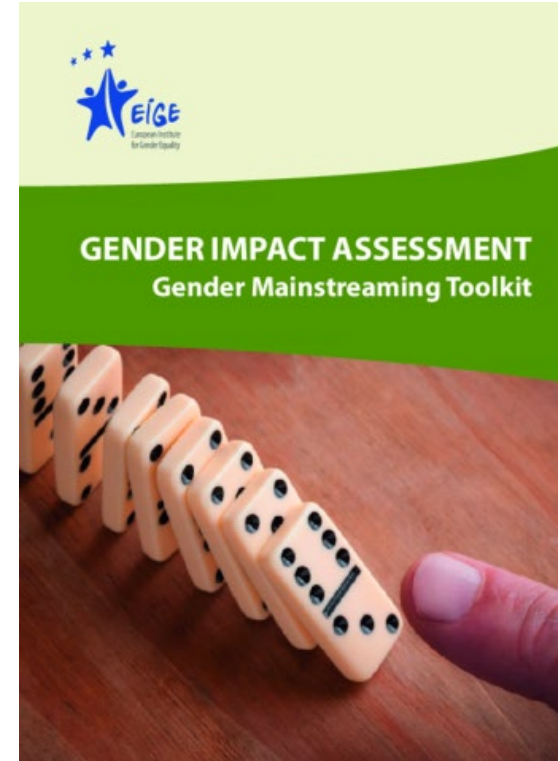
Gender impact assessment can be applied to legislation, policy plans, policy programmes, budgets, concrete actions, bills and reports or calls for research.

Gender impact assessment methods do not only have to be applied to policy in the making, they can also be applied to existing policies.

G(E)IA

The assessment involves a dual-pronged approach:

- the current gender-related position in relation to the policy under consideration, and
- the projected impacts on women and men once the policy has been implemented



G(E)IA target group

Target group:

- Individuals and legal entities.

Impact on the target group:

- Whether the proposal directly or indirectly affects women and men, regarding their access to and/or control of resources, their social position, or the gender-based social rules and norms.

G(E)IA stages

- Gender relevance assessment
 - Definition of policy purpose
 - Checking gender relevance
- Gender impact assessment
 - Gender-sensitive analysis
 - Weighing the gender impact
- Gender quality assessment
 - Findings and proposals

Step 1: Definition of the policy purpose

The first step is to define the purpose of the planned policy, law or program and show how it connects with gender equality.

- Is the intervention intended to contribute to gender equality?
- How is the intervention intended to contribute to gender equality?
- What are the existing gender equality objectives in this field?

Step 2: Checking gender relevance

Target group

Impact on the target group

- Direct

- A direct and immediate effect on the status and position of women and men.
- When regulating or affecting people's access to resources (grants, jobs, composition of committees, etc.).

- Indirect

- Even though the policy is not directly targeted at them, they can be affected by it. For example subsidizing companies – who are owners!

Step 3: Gender-sensitive analysis

How policy affects the living conditions and access to resources for women and men?

Analyse the situation of women and men in the field

Identify existing gender needs and inequalities

Step 3: Gender-sensitive analysis

Take into consideration the views of those concerned (primarily the groups that are directly targeted).

Is the planned intervention addressing the needs of both women and men, taking into account their different interests, roles and positions?

Consider inequalities between women and men in terms of access to resources (work, money, power, health, well-being, security, knowledge/ education, mobility, time, and so on)

Consider the norms and values that regulate the process of access to and control of resources.

Step 4: Weighing the gender impact

How the policy or legislative measure will contribute to gender equality, as well as to assess the foreseen impact on gender relations.

- Participation of women and men
- Access to and control of resources

GIA Report

Definition of the policy purpose

Gender relevance of the proposal

In-depth gender analysis of the proposal

Conclusions from a gender perspective

Proposals to improve the project in terms of gender equality

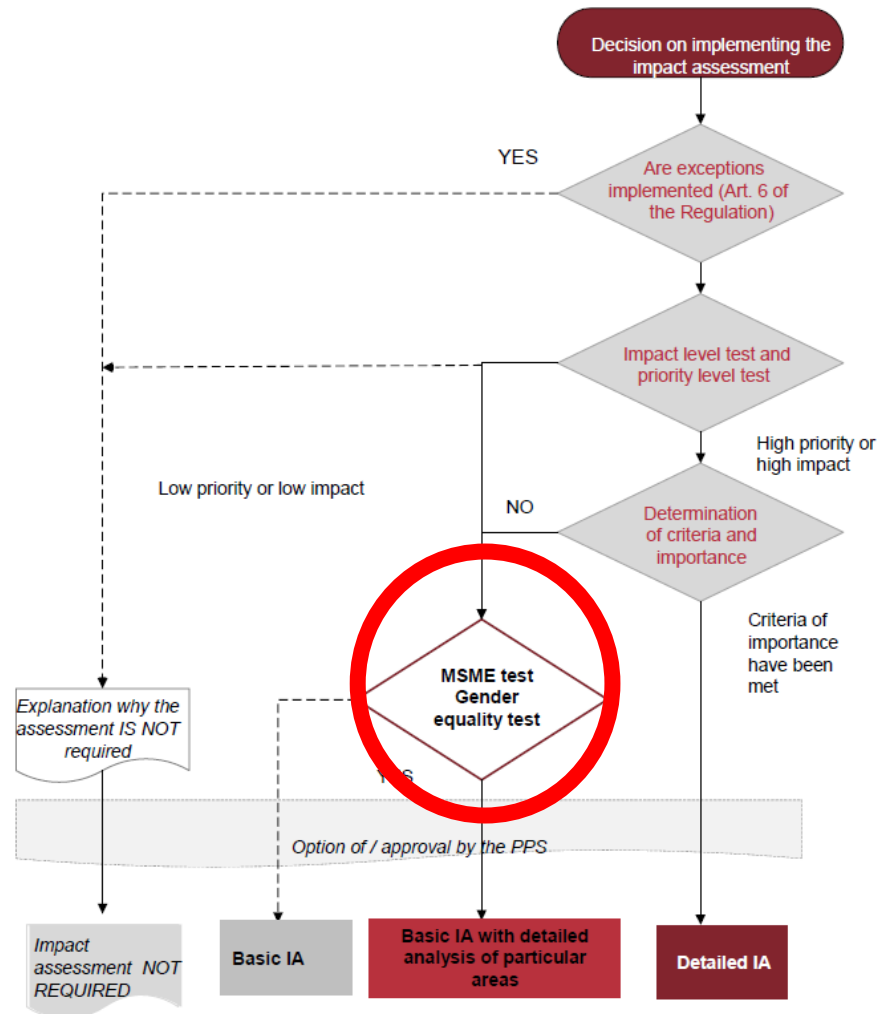
GA in EU and EU members

<https://eige.europa.eu/publications-resources/publications/gender-impact-assessment-gender-mainstreaming-toolkit>

Case Study

GE Impact Test

Test-RR-2707.docx (live.com)



Gender budgeting

The next step towards full institutional integration of gender mainstreaming would be to integrate the gender perspective in all phases of the budget cycle.

Gender budgeting integrates a gender perspective into the budgetary process, aiming to achieve gender equality.

The introduction of gender-sensitive budgeting informs allocation decisions and ensures that women and men have equal access to resources, are able to decide on them equally and receive equal benefits from the use of those resources.

Hence, gender budgeting aims to improve resource allocations by achieving more gender-equal outcomes.

Gender Budgeting

The implementation of gender budgeting requires the assessment, restructuring, monitoring, and evaluating achievements from a gender perspective.

Gender budgeting relies on using various analytical tools within the budget process.

The approach is not yet widely implemented; in 2017, only half of OECD members stated that they have incorporated or plan to incorporate gender budgeting into the budget process.

Case Study: Gender responsive (sensitive) budgeting in Serbia

Serbian Government has formally introduced gender responsive budgeting (GRB) in 2015 with the adoption of the new Budget System Law, when the promotion of gender equality was identified as one of the budget goals (Article 4).

GRB definition, Budget System Law, article 2,

- Gender responsive budgeting entails gender mainstreaming of the budget process, including gender analysis of the budget and restructuring of income and expenditures in order to advance gender equality.

Budget objectives, Budget System Law, article 4:

- Budget system should achieve the following: 4) efficient allocation of budget resources with the objective of advancing gender equality.

Lot of manuals

<http://www.skgo.org/storage/app/media/dobro-upravljanje/pubs/Prirucnik%20za%20uvodjenje%20ROB.pdf>

Equality Plans

As we stated before, governments often adopt a medium- to- long term vision statement that conveys a country's objectives for a gender-equal society.

These visions set expectations and are used as a benchmark for measuring reduction in gender inequality.

To be successfully implemented, they should reflect the needs of stakeholders (governmental institutions, social partners, and civil society), have clearly defined roles, responsibilities, and accountability, and have strong commitment from policymakers.

These goals, often termed equality plans, are the primary tool that articulates gender equality policies. Thus, implemented actions by public authorities regarding gender equality are normally contemplated in equality plans.

Equality Plans

Equality plans are a set of objectives and measures taken and approved by a government. Generally, they must be carried out at different administrative and governmental levels and within a specific period, ranging from two to five years.

The specific goals, strategies, and priorities outlined in gender equality plans can vary significantly depending on the country, organization, or context in which they are developed.

Equality Plans

The objective of equality plans usually includes all aspects or areas that affect women: education, work, culture, health, legislation, politics, leisure, environment, and rural environment.

Therefore, equality plans are designed to be a common umbrella under which all public actions concerning gender equality of a given government are explicit.

The plans often involve, at least formally, other administrative or governmental levels and non-governmental organisations. This renders equality plans the primary tool that articulates gender equality policies.

GEP Steps

The process of developing and implementing a GEP can be broken down into different steps.

- Assessing the status quo in your organisation. In this step, gender-disaggregated data is collected and organisational procedures, processes and practices are critically reviewed to detect gender inequalities and their causes.
- Identify objectives, set your targets and measures to remedy the identified problems, allocate resources and responsibilities, and agree on timelines.

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- Identify objectives, set your targets and measures to remedy the identified problems, allocate resources and responsibilities, and agree on timelines.
- Implement the planned activities
- Monitoring and evaluation

Case study

UNIVERSITY GEP

https://eucenje.bg.ac.rs/files/en/university/equality/Serbia-Guide_Universities_ENpdf

Three-Dimensional Objective

1. Remove gender-related institutional barriers.
2. Tackle gender imbalances in decision-making.
3. Integrate gender dimension into teaching, research, and innovation.

Gender Equality Audit

- **Purpose:** Analyze the current gender equality status.
- **Components**
 - Institutional structure and context.
 - In-depth data collection and analysis.
 - Key areas: careers, decision-making, content.

GEP Design

- **Strengthening Commitment:**

- Secure top-management commitment.
- Define roles, responsibilities, and resources.

- **Vision and Objectives:**

- Establish clear visions, objectives, measures, and targets.

Monitoring and Self-Assessment

- **Monitoring**

- Indicators to track progress.
- Regular monitoring and adjustments.

- **Self-Assessment:**

- Continuous reflexivity and evaluation.