



## The disconnection between reality and discourse. Why are resources important to tackle gender inequality in research organizations?


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**Abstract: Introduction:** This article serves as an introductory exploration of the significance of funding for gender equality. It delves into the relationship, emphasizing how progress on gender equality is questionable without adequate resources. Adopting a dual geographical approach, it provides an introductory overview of the global situation before narrowing its focus to the experience of the European Union. Given its core commitment to gender equality, the article analyzes the gap between commitments and data regarding gender equality investment. Special attention is given to the research sphere. **Objectives:** To establish, through existing literature, a clear relationship between gender equality and resource investment.: The article ambitions to lay the groundwork for a research line examining funding and gender equality within research funding. **Methods:** The authors conducted a detailed Scopus review of the literature using keywords such as funding, gender equality, women's rights, research funding, gender budgeting, and European Union. Initially, 34 articles were identified after applying two criteria to the results. Backward citation was employed to further expand the literature. Due to limitations in academic results, consultation and review of multiple grey literature sources were necessary. Given the interdisciplinary nature of the topic, an interdisciplinary perspective of analysis was required. **Contribution:** The literature reveals a noticeable gap between commitments to gender equality and the tangible allocation of resources. Additionally, it highlights the inadequacy of tools to track investment in gender equality, particularly evident in the European research sphere. These insights emphasize the significance of launching a research agenda that prioritizes advocacy for resources in research and academia, positioning it as a fundamental activity within women's academic activist networks. **Palabras clave:** Igualdad de género; financiamiento; financiación de la investigación; Presupuestos con enfoque de género; Unión Europea; diseño de políticas; movimiento de mujeres.

### ENG La desconexión entre realidad y discurso. ¿Por qué los recursos son tan importantes para atajar la desigualdad de género en el caso de las organizaciones del ámbito de la investigación?

**Resumen: Introducción:** Este artículo sirve como exploración introductoria del significado que tiene el financiamiento para la igualdad de género. Este artículo ahonda en la relación entre estas variables, enfatizando cómo el progreso en igualdad de género es cuestionable sin la suficiente inversión de recursos. El artículo adopta un enfoque geográfico dual, utilizando el plano global de manera introductoria, para ahondar el foco a nivel de la experiencia de la Unión Europea. Dado su compromiso con la igualdad de género, el artículo analiza la brecha existente entre esos compromisos y los datos referentes a la inversión en igualdad. **Objetivos:** Establecer a través de la literatura existente una relación clara entre igualdad de género e inversión de recursos. El artículo ambiciona establecer una línea de partida para una investigación que examine financiación e igualdad de género en el marco de la financiación para la investigación. **Metodología:** Las autoras llevaron a cabo una detallada revisión de la literatura usando palabras clave como financiamiento, igualdad de género, derechos de las mujeres, financiación de la investigación, presupuestos de género y Unión Europea. Inicialmente se identificaron 34 artículos tras aplicar dos criterios a los resultados. Se utilizaron las citas bibliográficas de esos artículos para expandir la literatura revisada. Dadas las limitaciones

de resultados académicos, la consulta y revisión de fuentes de literatura no convencional se hizo necesaria. Contribución: La literatura revela una brecha notable entre los compromisos con la igualdad de género y la verdadera inversión de recursos. De manera adicional, remarca la falta de herramientas para monitorear la inversión en la igualdad de género, particularmente en el caso de la esfera de investigación europea. Estos hallazgos enfatizan la importancia de lanzar una agenda de investigación que priorice la incidencia para la obtención de recursos dedicados a la igualdad de género en la investigación y la academia, posicionándolo como una actividad principal dentro de las redes de académicas feministas.

**Keywords:** gender equality; funding; research funding; gender budgeting; European Union; policymaking; women's movement.

**Summary:** 1. Introduction. 2. Methods 3. Findings. 3.1 “Let’s talk about money”: The relation between funding, gender equality policy and progress of women’s rights. 3.2 Gender budgeting, from international development agenda to research: the gender budgeting issue in the EU Research and Innovation system 5. Conclusions Funding. References.

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## 1. Introduction

This article is a starting point for a line of research into research funding organisations and gender equality, funded by a XXXX grant. The research question guiding this analysis is to what extent funding influences the achievement of gender equality policies, with a specific emphasis in research public policies at the European level. The article contemplates the inherent connection between funding and gender equality, shedding light on the apparent limitations of committing resources effectively to advance gender equality—a pivotal factor that can inadvertently contribute to fostering inequality. Understanding this relation is fundamental for the research, both as a way to justify the selection of the institutions that will be analysed (research funding organizations) and to establish the basis for an interdisciplinary approach to future research.

This is particularly important given the wealth of knowledge and reflection that both the women’s movement and the international development sector have developed around gender equality. In fact, there are other academic hubs, such as genderED<sup>1</sup>, currently combining and adapting these approaches to the particular context of research and academia. Through the review of existing literature and data, this article aims to make explicit and clear the intimate connection between funding and the possibility of progress for gender equality and women’s rights.

Gender equality has gained a lot of attention and political weight over the years. However, this has not always been matched by levels of investment. Therefore, understanding the relation between these two variables is key as a first step. On the other hand, to acquire an insight into the current state of affairs in the European Union, especially within the research sphere, we have conducted a review of the gender budgeting landscape in the European context, emphasizing research policy. The geographical scope of the analysis operates at two levels. On one side, a global analysis provides an overview of the general situation regarding funding for gender equality, extending from Beijing. On the other side, a more focused examination delves into the situation within the European Union.

This review has addressed us toward an intriguing potential future research agenda on gender equality, emphasizing the significance of advocacy and influencing public policies to address underfunding. Drawing insights from the experiences of women’s organizations and the women’s movement in organizing and tracking funds dedicated to gender equality could unveil innovative approaches to organizing and funding activities. These approaches may not always align with the institutional agenda and *modus operandi* of academia and research, potentially sparking transformative changes for gender equality in the sector.

## 2. Methods

The **methodology** employed in this article has consisted of reviewing secondary sources with a focus on resources for gender equality. The first step for this desk-based research consisted of undertaking a Scopus search using different combinations of the selected keywords: funding; gender equality; women’s rights; research funding; gender budgeting and European Union. The authors wanted to explore both the wording of gender equality and women’s rights; given the fact that gender equality puts the stress on the change of structural conditions; and is largely employed in institutional settings. However; it is crucial to maintain a women’s rights perspective to keep the sight on the practical and strategic needs of women. The term funding focuses on the idea of public investment and dedication through public policy. In addition; research funding entails a public goods approach to science (Yin et al.; 2022). Gender budgeting is understood as an approach to government planning and budgeting which promote gender equality goals (Rihab Khalifa and Scarparo; 2021).

<sup>1</sup> GenderED is a university hub from the University of Edinburgh dedicated to gender and sexuality studies from an interdisciplinary perspective ([www.gender.ed.ac.uk](http://www.gender.ed.ac.uk)).

Table 1. Key words and results from the Scopus research

Key words	Number of results	Merged categories	Selected articles
Funding for gender equality	326	Funding for gender equality	9
Funding for women's rights	361	Funding for women's rights	5
Funding gender equality policies	103	Gender equality in research funding	7
Gender equality in research funding	84	Gender budgeting in the EU	6
Gender budgeting	234	Gender budgeting in research	7
Gender Budgeting in the European Union	7		
Gender budgeting in Research	66		

Source: Prepared by the authors.

From the results, in total, thirty-four articles were initially identified through the title and abstract reviews. The articles selected responded to two basic criteria. The scope and approach of the articles should have a universalistic, global or supranational (EU) perspective of the phenomenon. Some related to specific geographical scope were initially selected but then discarded. The second criteria had a similar objective, but at the thematic level, looking for perspective that reflected on the topic from a governance and general public policy perspective, and not tangentially or related to specific areas (many articles were related to health issues, for example). From these, six entries repeated under different categories. Hence, only twenty entries fit the terms of the search. These articles, through their reference lists, pointed towards new bibliography, as the initial search fell short and the search needed to be diversified.

It is seminal to note that the intention was not to undertake a systematic literature review, but to elaborate a critical reflection based on a bibliography already available. The limitation on the search results and the lack of numerous sources at the academic level on those topics and approaches made necessary the extensive use of grey literature generated or commissioned by institutional actors (mostly UN and the European Union). Besides, this grey literature is key given those actors are the ones generating policy and allocating resources.

Policy papers on gender budgeting in the sphere of the European Union were identified and reviewed, to ascertain the existence of already-existing budget tracking for gender equality.

The article embraces an interdisciplinary and comparative approach. It does so by bringing knowledge and experiences from the women's rights movements in the area, actors which, as the bibliography proves, have been key to advance in this area. Preliminary findings of this paper were presented and feedback received during the STS Conference Graz 2021<sup>2</sup>. The paper is divided into two sections. The first section reviews the global landmarks and evolution of gender equality inclusion into policy, and its poor translation into funding. The second section puts attention to the European Union case, given to its strong foundational commitment to gender equality, and the specific case of its research policy.

### 3. Findings

#### 3.1. "Let's talk about money": The relation between funding, gender equality policy and progress of women's rights

An adequate level of resourcing plays a crucial part in the progress of gender equality indicators. UN Women's review of Beijing+25 recognizes that gender equality means little if adequate resourcing does not back it up (UN Women, 2020). The Declaration and Platform for Action baldly stated that its success depended on the "adequate mobilization of resources" at national and international levels (United Nations, 1995, 5). According to UN Women, the percentage of development resources allocated specifically to gender equality "typically languishes at less than 5 per cent" (UN Women, 2020, 3) a fact that shows the existing disconnect between the allocation of resources and discourse (Walji, 2017).

Beijing is a good example of this lack of adequate financial support for international commitment. The Declaration and Platform for Action were a breakthrough for women's rights and a radical transformative agenda for gender equality. However, the investment did not level political engagement. Negotiations did not secure an adequate level of investment in gender equality, which led to insufficient economic commitment and had implications for the realization of Beijing's goals (Alpízar Durán, 2015; Hessini, 2020).

International commitment to gender equality and women's rights has escalated through international agreements linked to the development field, initially through the Millennium Development Goals (MDGs), where gender equality was stated as an intrinsic goal (Kabeer, 2005), followed by the 2030 Agenda and the Sustainable Development Goals (SDGs). In the case of the SDGs, the new agenda has included not only a dedicated objective on gender but also eleven other goals containing targets on the issue, which would require high levels of financing to make them viable (Esplen and O'Neill, 2017).

Esplen and O'Neill (2017) note the substantial increase in investment in gender equality issues since the MDG at the level of Official Development Assistance (ODA), tripling from US\$8 to US\$28 billion (Esplen and O'Neill, 2017). Despite this increase, the levels of ODA dedicated to gender equality continue to be very low

<sup>2</sup> We thank the participants of the panel "Let's talk about money, sister!" for their valuable feedback.

given the ambitions. The OECD notes that official development assistance dedicated to gender equality stalled at 4% in the case of bilateral ODA (Thompson *et al.*, 2020) They also observe that, according to their estimations, SDG 5 – “Achieve gender equality and empower all women and girls” – may be the third least financially supported. According to [aiddata.org](https://www.aiddata.org), SDG 5 will receive \$9.2 billion, very far from the \$343 billion for SDG 16, \$180 billion for SDG 3 and \$117 billion for SDG 17<sup>3</sup>. This is not an issue strictly related to official assistance but seems also to be a pattern in private philanthropy, where only 16% of the funds are dedicated to gender equality (Thompson *et al.*, 2020).

Table 2. SDG's goals and targets with a gender optic

GOAL 1: To end poverty	Target 1.b	Mentions the needs for gender-sensitive development strategies
GOAL 2: Zero hunger	Target 2.2. Target 2.3	<ul style="list-style-type: none"> <li>Reminds about the specific case of pregnant and lactating women.</li> <li>Calls for specific attention to women food producers.</li> </ul>
GOAL 3: Ensure healthy lives and promote well-being for all ages	Target 3.1 Target 3.7	<ul style="list-style-type: none"> <li>Address to the topic of maternal mortality</li> <li>Refers to sexual and reproductive care</li> </ul>
GOAL 4: Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all	Target 4.5 Target 4.7 Target 4.a	<ul style="list-style-type: none"> <li>Calls for the elimination of gender disparities.</li> <li>Includes gender equality as part of the core topics to promote as part of education for sustainable development.</li> <li>Calls for gender sensitive education spaces</li> </ul>
GOAL 5: Achieve gender equality and empower all women and girls	Target 5.1 Target 5.2 Target 5.3 Target 5.4 Target 5.A Target 5.B Target 5.C	This is a gender specific objective which calls for the end of discrimination, violence and harmful practices against women and girls. It also focuses on changing structural and social causes of inequality (from care to economic resources) and calls for the establishment of policies and legislation that promotes gender equality and women's empowerment.
GOAL 6: Ensure availability and sustainable management of water and sanitation for all	Target 6.2	Calls for adequate sanitation and hygiene which takes in consideration the needs of women and girls.
GOAL 8: Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all.	Target 8.8	Calls for labour rights and labour environments which are safe, including specifically migrant women.
GOAL 10: Reduce inequality within and among countries	Target 10.2	Calls for social, political and economic inclusion, without any type of discrimination (including sex)
GOAL 11: Make cities and human settlements inclusive, safe, resilient and sustainable	Target 11.2 Target 11.7	Calls for transport systems which have special attention (among others) to women's needs. Request universal access to adequate public spaces for women (among others)
GOAL 13: Take urgent action to combat climate change and its impacts	Target 13.b	Asks for climate change planning and management with a focus on women (among others)

Source: Prepared by the authors on the basis of <https://www.un.org/sustainabledevelopment/>

Despite different efforts, there does not exist an international commitment to an agreed target to cover the goals of gender equality. The Canadian presidency of the G7 in 2018 recommended a 20% goal that was not picked up, despite being already achieved by several donor countries (Thompson *et al.*, 2020). However, there is a general acknowledgement at an international level of the relevance of adequate resourcing for the achievement of gender equality. The European Institute for Gender Equality (EIGE) recognizes that the practical realization of gender equality demands “dedicated and consistent funding” (EIGE, 2018).

In the last of the conferences on financing for development, the Addis Ababa Action Agenda noted the importance of gender mainstreaming in investment and the “formulation and implementation of all financial, economic, environmental and social policies,” and highlighted that the budgeting process has responsibility for promoting and tracking a gender perspective (International Conference on Financing for Development, 2015). This approach of the international community to financing gender equality entails not only securing the necessary flow of resources through the international community but also an adequate commitment at country level, through national budgets.

The seriousness of states (or any other institution) about their gender equality commitment can be estimated by the level at which gender-equal budgets match their rhetoric. Government budgets are enacted by law, which generates governmental obligations. Hence, it is unrealistic to assume that gender equality commitments, such as the implementation of the Convention on the Elimination of all Forms of

<sup>3</sup> Data available at <https://www.aiddata.org/sdg>

Discrimination against Women (CEDAW), ratified or acceded by 189 countries, will not carry financial implications (Elson, 2006).

General Comment 16 of the Covenant on Economic, Social and Cultural Rights establishes a direct relationship between the adoption of commitments, the implementation of policies and the availability of resources. The Covenant argues that for states to ensure substantial equality they need to “design and implement policies and programs to give long-term effect to the economic, social and cultural rights of both men and women on the basis of equality” (UN Committee on Economic Social and Cultural Rights (CESCR), 2005, 5). In addition, it notes that to be successful these programs need purposefully to include the allocation of resources ” (UN Committee on Economic, Social and Cultural Rights 2005, 5). It is also relevant to remember that this funding should not only be addressed to gender-specific politics but also to gender mainstreaming into any policy.

Acquiring coherence between resources and gender equality objectives is not an easy task, given that designing gender-sensitive budgets usually raises strong opposition (Elson, 2004, 2006). However, to effectively influence women’s and men’s realities and achieve women’s rights “mobilising maximum available resources” is part of the equation (O’Hagan and Klatzer, 2018, 6). A multipronged and phased approach to gender budget initiatives (GBI) may facilitate the task of utilizing GBI to raise awareness and understanding of the impact of budgeting on policies in relation to equal opportunities.

States need to be aware that budgets can either reduce, maintain or increase gender inequality; they are not a neutral tool (EIGE, 2018). Gender budgeting entails not only analyzing budgets through a gender lens and plan and executing accordingly (Council of Europe, 2005), but it can be understood as an “emancipatory” tool which serves to “feminist policy change” (Council of Europe, 2005). To achieve so, states must provide an enabling environment encompassing strong political commitment, leadership and clarity about shared responsibility. Furthermore, a participatory approach, which achieves the engagement of different parties such as academia, civil society and gender advocates, is highly beneficial to representing different knowledge, interpretations and experiences (OECD, 2020). Feminists’ alliances within organizations and networks also play a vital role (O’Hagan and Klatzer, 2018; Wajli, 2017).

Unfortunately, despite the proven importance of resources for gender equality, according to OECD data only half of OECD countries do gender budgeting (Esplen, 2016)<sup>4</sup>. Among those, the majority employ approaches where some consideration for gender is made for policy decisions or allocations, or there is some kind of gender analysis of the budget impact (Downes, Von Trapp and Nicol, 2016). Hence, very few countries are applying a holistic understanding of gender mainstreaming in the budgetary process. Moreover, it is worth noting that most OECD countries implement GBI bound by legal foundations, while only a few undertake these actions by political convention (Downes, Von Trapp and Nicol, 2016).

Gender advocates point out that a high number of governments have expressed support for the gender equality agenda, but there exists a worrying disconnect between these commitments and how governments raise and spend resources (Elson, 2004; Batliwala, Rosenhek and Miller, 2013). In conclusion, a budget is an expression of a government’s choices and a prioritization exercise (Esplen, 2016). Hence, it is reasonable to argue that budget choices and prioritization of resources for gender equality have an impact on the realization of those commitments<sup>5</sup>.

To finalize, it is of justice to note that, as the search of literature shows, women’s rights organizations<sup>6</sup> have been particularly aware of the relationship between resources and the advancement of women’s rights. There is evidence that supports the effectiveness of their activity to advocate and promote favorable changes for women’s rights in policy frameworks and legal regulations or social norms (Htun and Weldon, 2012; Arutyonova and Clark, 2013; Batliwala, Rosenhek and Miller, 2013; Esplen, 2016; Bashi *et al.*, 2018; Hessini, 2020). Ironically, despite being recognized actors in the advancement of women’s rights and transformative change for gender equality (Batliwala, Rosenhek and Miller, 2013; Esplen, 2016) they are seriously under resourced<sup>7</sup>. Probably as a consequence, and because of having gender equality and women’s rights at the heart of their mission, they have considered it particularly necessary to monitor funding trends for women’s rights and gender equality funding (Wajli, 2017).

Gender equality advocates have been preoccupied with the lack of funds to implement governments’ commitments to gender equality, as well as the fragility of resources that have an impact on women’s lives (Elson, 2004). Gender budgeting initiatives have been implemented, as in the case of the pioneering example of Australia, thanks to the efforts of gender justice activists (Elson, 2006; Downes, Von Trapp and Nicol, 2016; R. Khalifa and Scarparo, 2021). In 2019, in preparation for the Beijing+25 conference in Mexico City, feminists from different geographical locations gathered to strategize. Funding was among the issues identified that required an immediate response. They recognized this was «critical time to access, critique, and re-invigorate the funding landscape for advancing gender justice and women’s human rights» (Women Radically Transforming a World in Crisis, 2019,15). In their opinion, the system put in place after Beijing was inadequate and addressed to intermediaries (NGOs, governments and

<sup>4</sup> Austria, Belgium, Canada, Chile, Finland, Germany, Iceland, Ireland, Israel, Italy, Japan, Korea, Mexico, Norway, Portugal, Spain and Sweden.

<sup>5</sup> Women’s rights activists in Australia advocated to promote this approach, which was piloted from 1984.

<sup>6</sup> Civil society organizations with an overt women’s or girl’s rights, gender equality or feminist purpose (Esplen, 2016, 5).

<sup>7</sup> According to OECD data, the volume of funding directly addressed to women’s rights organizations in 2014 was lower than in the past, \$192 million, representing “3% of the aid that targets gender equality as a principal objective, and 0.5% of the total aid to gender equality in 2014”.

multilateral institutions); and equally important, the funds were destined for technical solutions that ignored rights-based approaches.

### 3.2. Gender budgeting, from international development agenda to research: the gender budgeting issue in the EU Research and Innovation system

Gender equality has been a fundamental principle for the European Union, which has been translated into a solid framework of policies and laws, one of the foundations for achieving progress in gender equality (Autor/a, 2021). According to EIGE, the EU's gender equality commitments can hardly be realized if the EU's economic governance lacks an adequate gender budgeting approach. Nevertheless, gender budgeting is not a requirement when implementing EU Funds programs (EIGE, 2018, 2021).

A gender perspective embedded from the onset is a prerequisite to generating funding for gender-sensitive programs (EIGE, 2018). This entails a change of mindset and the existence of an enabling environment at the macro level that could impact the micro level and facilitate the attainment of goals. Unfortunately, the legal basis of EU spending programmes shows a weak and piecemeal commitment to gender" (Simoes and Calatuzzolo, 2020, 2).

The European Parliament<sup>8</sup> identifies the gap between rhetoric and practice by pointing out how some policies and programs do not have either a gender equality objective or gender-equal budgeting. For that reason, it appeals to the Commission to consider gender budgeting at all stages of the budgetary process, from implementation to evaluation, for every possible fund (Ludovici Samek, Pesce and Loi, 2016; EIGE, 2018; European Parliament, 2017). The Multiannual Financial Framework (MFF) is a binding framework for the EU budget, setting the ceiling for the budget as well as the spending for every policy area. Hence, its importance for gender equality, as it is a tool for allocating investment.

In 2017, the Parliament showed deep concern in a resolution on EU funds for gender equality. The institution remarked how gender equality considerations have not been considered fully in budget allocations and spending decisions and no institution had implemented gender budgeting in a consistent manner. In this Declaration, the Parliament regrets that despite the agreements and resolutions around gender mainstreaming in the 2014-2020 MFF Regulation, there has been poor progress in the area. For example, it highlights how the Commission lost its opportunity to analyze its progress during the MFF mid-term review (European Parliament, 2017).

According to the European Court of Auditors, gender mainstreaming has not been applied to the whole of the EU budget, because it does not have adequate tools and mechanisms (this is the case for the 2014-2019 MFF, at least). In consequence, the EC is not fulfilling its gender commitments, despite reaching agreements with the European Parliament and the European Council to consider gender-responsive elements during the 2014-2019 budget cycle (European Court of Auditors, 2021). Despite the lack of a coherent and general approach to gender budgeting, the Common Provisions Regulation (CPR) has laid down common provisions for the ESI Funds (European Commission, 2018).<sup>9</sup> During the 2014 to 2020 MFF, article 7 of this Regulation stated that both the Commission and the member states should secure the promotion of gender equality, and take it into consideration along the cycles of programs.

The European Gender Equality Strategy 2020-2025, includes a funding section, as a prerequisite to progress for gender equality. The strategy remarks the need for the MultiAnnual Financial Framework to ensure a gender approach "throughout the financial framework" (European Commission, 2020). Equally, it requests Member states to have gender equality strategic frameworks and having dedicated budget through the program "Citizen, Equality, Rights and Values Programme". The common provision regulations laid down in 2021 by the Parliament and the Council establish how the funds need to be assessed on the basis of information collected, which should enable monitoring<sup>10</sup> of the support of gender equality. Similarly, when considering partnerships the provisions highlight the importance of the representation of gender equality and non-discrimination organizations. Gender equality is considered as well one of the selection criteria for the selection of operations.

In 2020, the Commission, the Council and the European Parliament reached an interinstitutional agreement for the Commission to develop a method for measuring relevant expenditure at program level in the 2021-2027 MFF. A pilot test in certain programs will be undertaken by 2023 (European Court of Auditors, 2021). Probably for this reason, the annual report on gender equality in the EU from 2021 draws a much more optimistic picture. It reflects this Commission's ambition to develop a methodology to track gender investment at program level, including gender into public procurement, and to "consider" measuring expenditure related to gender equality at program level in the 2021-2027 MFF (European Commission, 2021).

It is also noticeable how the new program Citizens, Equality, Rights and Values (CERV), a continuation of the Citizenship, Equality, Rights and Values program, will dedicate over €1.5 billion to promote the EU's core values and rights, including gender equality<sup>11</sup> (EIGE, 2018; European Commission, 2020, 2021). It is important to note however that gender equality often falls under different policies and competes with

<sup>8</sup> The parliament conducted two analyses of gender budgeting in the EU, in 2015 and 2019 (Cengiz and Beveridge, 2015).

<sup>9</sup> The European structural and investment funds are: European regional development fund, European social fund, Cohesion fund, European agricultural fund for rural development, European maritime and fisheries fund.

<sup>10</sup> The Financial Regulation governing the EU's general budget contains no specific requirements on gender-related objectives, but it does include a general requirement to establish program objectives.

<sup>11</sup> Evidence shows that in order to progress gender equality it is necessary to have a two-pronged approach that combines gender mainstreaming and gender-specific actions.

other policy objectives to secure funding, while gender budgeting is not considered a compulsory tool within policy areas, which compromises its success (Simoes & Calatozzolo, 2020). This contrasts with the existence of expenditure targets for other topics such as sustainable development and climate change. Moreover, these targets count on monitoring mechanisms that can assess the level of achievement of this goal. Interestingly, 30% of the funds under the Next Generation EU and the MFF are allocated to fighting climate change (European Court of Auditors, 2021).

The Court of Auditors analyzed in 2021 the program objectives of the fifty-eight spending programs. Of those, only four – Rights, Equality and Citizenship (REC), the European Social Fund (ESF), Erasmus+ and the Health program – included explicit references to promoting gender equality as one of their objectives.<sup>12</sup> In the case of those proposed for the 2021-2027 MFF, only the REC program (which became the “Citizens, Equality, Rights and Values” program) and the ESF included specific references to gender equality. It also attested how the two reports that account for the EU budget performance have increased its gender-related information. However, the institution remarked that they do so in an inconsistent manner (European Court of Auditors, 2021). As seen above, despite some incipient and patchy examples of good practice, most programs in the EU funds do not track gender equality spending (EIGE, 2018). However, Horizon 2020 is an interesting exception. This program identified the allocations for gender-related activities per financial year (EIGE, 2018). Spending decisions within the program involve different services to the DG, including that of the gender sector (Cengiz *et al.*, 2019).

The program included funding destined to initiatives aimed specifically at deepening gender-sensitive approaches in science and innovation, for example, developing a framework to assess and evaluate national initiatives promoting gender equality in research policy, under the GERI-3-2015 tender call. It also foresaw campaign work or research funding to identify how gender diversity on teams affects research (Samek, Pesce & Loi, 2016). The European Parliament praised the existence in the program of these lines of funding that are exclusively dedicated to gender structural change and other gender equality topics.

It is key to note that Horizon 2020 encouraged and funded research organizations to enact institutional transformation through the implementation of gender equality plans (GEPS) (European Commission and Directorate-General for Research and Innovation, 2017; Cengiz *et al.*, 2019). The 6th Framework Program had already included funding for gender equality plans, but the 7th Framework program consolidated this trend. Horizon 2020 meant a great push towards programs for gender equality plans. Through Horizon 2020 and FP7, thirty projects have been implemented by research performing and funding organizations (European Commission and Innovation Directorate-General for Research and, 2021).

The increase of financial support in the R&I European field can be observed in the following tables from programs from FP7 and Horizon 2020. The tables are the result of a search in CORDIS including the terms FP7, Horizon 2020 and gender/gender equality. The results show an increase of almost €20 million in investment on this type of project. However, it is necessary to understand that the increase is relative, given the general funds for Horizon 2020 had also increased substantially<sup>13</sup>. It is important to note that we have not mapped projects that include the buzz word “gender” but the specific EU calls targeting gender equality in research.

Table 3. FP7 gender equality projects

Call	Dates	Project	Total funded
SiS.2013.2.1.1-1 - Supporting changes in the organisation of research institutions to promote Gender Equality	From 2008 to 2023 Average length of projects, 3 years	PRAGES) GENDERA WHIST GENSET DIVERSITY GENIS LAB LAB - GENIS LAB) INTEGER Euro-Mediterranean research cooperation on gender and science: SHE FESTA STAGES GENPORT ( GENDERTIME GENDERCIT SAPGERIC GENOVATE GARCIA EGERA TRIGGER GENDER-NET	33.764.698,67

Source: Prepared by the authors from existing information in CORDIS.

<sup>12</sup> The Financial Regulation governing the EU's general budget contains no specific requirements on gender-related objectives, but it does include a general requirement to establish program objectives.

<sup>13</sup> Going from 55 558 millions during the FP7 to 77 992 millions in Horizon 2020.

Table 4. Horizon 2020 gender equality projects

Call	Dates	Projects	Total Funded
H2020-SwafS-2016-17	From 2017 to 2023	I-CONSENT Project GEECCO GENDER NET GENDERACTION ACT R-IPEERS Project CHANGE TARGET SUPERA	€54,331,179.20
H2020-SwafS-2018-2020	From 2019 to 2024	Gender-SMART SPEAR CASPER TARGETED-MPI UNISAFE EQUALS-EU GE Academy GEARING ROLES CALIPER The LeTSGEPs GENDER STI shemakes.eu RESET MINDtheGEPs ATHENA	

Source: Prepared by the authors from existing information in CORDIS.

Taking all of this into consideration, it is not easy to trace and identify the totality of funding that was dedicated to gender equality, even more at an institutional level given the institutional and country particularities. According to the Horizon 2020 Monitoring report (2016), 36.2% of projects implemented within the frame of the program included a gender component, which does not automatically translate into financial investment (European Commission, 2016). The interim evaluation of Horizon 2020 lowered this data to 32.4% of projects, pointing out that the indicator in itself was problematic given the poor understanding of the gender dimension concept (European Commission and Directorate-General for Research and Innovation, 2017). In fact, only the €43 million for the GERI program was financially accessible (Samek, Pesce, & Loi, 2016).

According to Samek, Pesce, and Loi (2016), through the search engine of Horizon 2020, 122 projects contain the words “gender” or “gender equality.” However, only 71 projects out of 10,128 (a meager 0.007%) include gender in their summaries and objectives (Samek, Pesce and Loi, 2016). Hence, the dedication of funds to gender equality within the majority of Horizon 2020 is scarce. European Commission data estimates that potentially €2.1 billion (only 5% of Horizon 2020 investment) relate to SDG5 “achieving gender equality and empowerment of all women and girls” (European Commission Directorate-General for Research and Innovation, 2020).

The successor program, Horizon Europe, has an allocation of €95.5 billion. The program included some measures that reinforce gender equality enforceability, for example, including gender equality plans as an eligibility criterion to access funding or guaranteeing the inclusion of the gender dimension across the whole program. Apart from other efforts, the program will also dedicate funding to support the development of gender equality plans, as well as to gender studies and intersectional research (European Commission - Directorate-General for Research and Innovation, 2021)

Specific funding for gender equality lies under the 2021-2022 work program, “Widening participation and strengthening the European Research Area.” In 2021, there were two calls specifically for gender equality. One of them is to build a centre of excellence on inclusive gender equality in Research and Innovation and a policy coordination scheme to advance gender equality objectives within the member states (European Research Executive Agency, 2022). However, when trying to identify the rest of the pillars of the program there is no specific way to identify whether gender equality is included in the funding. Similarly, there is no gender equality investment funding among its targets. In contrast, there is for climate change (35%).

It could be argued that the commitment to gender equality as a priority for the European Research Area (ERA) is still a work in progress for the Commission.

For this reason, it is worth reflecting on the lack of a coordinated effort from a feminist platform to oversee and advocate specifically for gender equality investment within the sphere of research and innovation, unlike the coordinated efforts observed in the global sphere. Nevertheless, some initiatives are keeping an eye on this issue.

The European Network of Women’s Scientists has issued policy positions on the topic, and the Standing Working Group on Gender in Research and Innovation (SWG GRI)<sup>14</sup> scrutinized the funds that different national funding agencies had allocated to develop gender-mainstreaming strategies and gender dimension into their content and programs, as outlined in their “Report on the implementation of Council Conclusions of 1 December 2015 on Advancing Gender Equality in the European Research Area”. Interestingly, only nine agencies from the EU and associate countries provide such incentives, with some having no resources allocated or information provided (ERAC SWG on Gender in Research and Innovation, 2018)

<sup>14</sup> This was known as the Helsinki Group on Gender in Research and Innovation until 30 June 2017.



## 5. Conclusions

As repeatedly showcased by data and experts throughout this article, there does not seem to exist a direct correlation between the existence of high-level political commitment for gender equality and the same level of resource investment. At a political level, gender equality has generalised support, as multiple declarations cited in the article attest (Beijing, Accra, etc.). However, the institutionalization of the operational side of this support through adequate funding is still very weak. Few countries implement a gender budgeting approach (Downes, Von Trapp and Nicol, 2016) and institutions such as the European Union fall short in their practical commitment.

Feminist activists have paid enormous attention to this issue, as they have a clear understanding of the direct relation between adequate resourcing and the progress of gender equality issues. They have advocated and established alliances, strategies to advocate and monitor donors' and states' commitments in this regard. They have also understood the relevance of creating and publicizing knowledge around the topic that can serve both for advocacy and accountability purposes. Despite gender equality being a very relevant topic today for research and academia, this connection between resources and gender equality seems not to have captured the same level of attention and interest that it has had for the feminist movement.

Attention to research funding for gender equality is scattered in terms of efforts and literature. Literature appear to reflect on, among other issues, the existence of a gender bias in funding depending on the sex of the researchers<sup>15</sup>. However, this analysis does not include more general critical reflection about funds allocation. Likewise, this type of literature is part an individualized attempt to respond to a research question, not an organized and networked attempt to monitor, advocate and influence the system to increase the funding dedicated to women's rights and gender equality and/or mainstreaming.

Researchers and academics have an interesting characteristic in their profile as women's rights activists: their focus on the generation of knowledge. The knowledge they generate holds the potential to inform and influence policy. In fact, consultations with academic experts is a common procedure in policymaking, and academics themselves often ambition to influence policy making (Oliver and Cairney, 2019; Verge, 2021).

The present article aspires, from a modest perspective, to present the need of initiating a new line of academic research focused on monitoring the allocation of funds for gender equality at the European level, and more specifically within the research sphere. Furthermore, the need to learn and replicate in the context of academia, research and specifically research funding how gender equality actors can influence the system in a coordinated and systematic manner.

Similarly, institutional feminism in the research and academia sphere has not been equally vocal regarding funding dedicated to gender equality in this sphere. Among other issues, this may be provoked by the fact that there does not exist sufficient research on feminist academics' way of organizing (Verge, 2021). As Tildesley, Lombardo and Verge (2021) argue "further research is needed to assess how gender equality actors seek to counteract resistance and push for feminist institutional transformation".

This indicates a specific need to analyze, as a future line of research, how gender advocates within academia and research could influence the structures that take decisions around funding.

Until then, already existing knowledge developed by the women's movement could guide these actors, who could adapt and replicate these strategies in the context of academia, research and specifically research funding. Gender equality actors in this sphere could play a vital part in influencing the system in a coordinated and systematic manner.

Last, but not least, establishing strong lines of research that highlight this problem in a set manner would be a way to start overcoming this gap, benefitting in this case from the double role that gender activists within the academic sphere play, as both activists and experts. These are experts who can contribute to policy making and who by monitoring these trends and resources could contribute to strengthening gender equality results within the academia and research field, overcoming problems such as the lack of quality data in the implementation of these programs (European Commission, 2020)

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<sup>15</sup> Tildesley, R., E. Lombardo, and T. Verge (2021, 18) show, for example, how despite a balanced number of men and women leading research projects, women PIs were granted an average of €3,000 versus an average of €300,000 Euros for male researchers.

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