



## Discussion Paper

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# Integrating Gender into EU Economic Governance: Oxymoron or Opportunity?

- Over the last decade, gender equality in the EU has not only lost its clout, but is slipping off the political agenda altogether. Instead, economic governance instruments, designed to keep government expenditures at bay by practising fiscal austerity, have dominated the European political stage.
- The economic crisis alone cannot explain the diversion of policy away from gender equality. There are many other reasons that could account for the change from the once coveted policy of gender mainstreaming – solidly embedded in the European Treaties and applied to all EU policy areas – to a policy guided by a quasi clandestine programme that has downsized its importance to a mere “Engagement” in gender equality.
- Rather than being a central component of the EU’s macroeconomic recovery strategy, gender equality – one of the Union’s strongest common social objectives since the signing of the Treaty of Rome – is instead treated as a mere add-on. While the OECD, the World Bank and the World Economic Forum repeatedly and convincingly argue that gender equality generates growth as well as justice, European Union policy-makers do not seem to have integrated this thinking into their macroeconomic policy.
- Putting in place revised or new governance structures and processes takes time. The authors of this paper therefore examine how existing and well-tested structures, which promote the integration of the gender dimension into macroeconomic policymaking, could be used to ensure better and more democratic governance. Such approach could also facilitate a transition away from austerity and towards objectives that constitute a caring economy.

# Contents

Introduction.....	3
1. State of play .....	3
2. The undoing of a success story .....	4
3. Gender-blind governance: a recipe for failure .....	5
4. Towards a gendered economic governance model.....	7
5. Reforming EU governance from a gender perspective.....	8
References.....	11
About the authors .....	12

## Introduction

Over the last decade, gender equality in the EU has not only lost its clout but is slipping off the political agenda, as many researchers have observed (Jacquot, 2015; Hubert & Stratigaki, 2017). Instead, economic governance instruments designed to limit government expenditures by practising fiscal austerity have dominated the European political stage. These fiscal policies have visibly and painfully impacted on an array of social sectors that form the backbone of the various EU welfare systems. Macroeconomic policies driven by numbers – with GDP as the main performance indicator – were given a further, serious push with the onset of the 2008 financial crisis. This in turn paved the way for changing the EU's focus and left little room for other policy objectives: gender equality policies were among those left behind.

The economic crisis alone cannot explain the diversion of policy away from gender equality. There are many other reasons that could account for the change from the once coveted policy of gender mainstreaming – solidly embedded in the European Treaties and applied to all EU policy areas – to a policy guided by a quasi clandestine programme that has downsized its importance to an 'Engagement' in gender equality, rather than a strategy or a programme. Current analyses try to explain it by pointing to shrinking institutions, weakening pressure of stakeholders, and even a deficit of ideas.

In this paper, we will concentrate on the economic governance processes that have prevailed since the beginning of the financial crisis, as well as their impact on existing EU gender policies. We will argue that gender equality policies are incompatible with the neoliberal project of the EU in recent years. We will examine the stages of the quiet dismantling of the gender equality policy at the EU-level, together with the establishment of economic governance machinery that has institutionalised a new overall policy approach in the EU. We will ask whether this marks a serious failure to keep up with the EU commitment to gender equality, or if a comeback is on the way.

Our analysis will lead us to seek out those factors that colluded against a proactive and transformative gender equality policy. More importantly, we will look at an alternative scenario: how a gender-balanced (gender aware) treatment of debt, budget deficits and investments could not only have worked but proved more effective, fair and sustainable. In other words, how a properly implemented gender perspective could help foster sustainable economic growth and well-being in Europe.

This is a very broad field of investigation that has so far barely been touched upon, but it is one that merits urgent investigation (Hoskyns, 2008; Perrons, 2015). As for now and building on what has already been accomplished, we will propose some basic tools, such as gender budgeting and high-level commitment in the form of a group of Commissioners for gender mainstreaming, leaving it to further research to develop these elements into a more solid policy framework.

## 1. State of play

Over the last 60 years, European countries have steadily moved towards greater and upward convergence and built today's European Union of 28 Member States: the largest economic block in the world. From its inception in 1957, the policies of the European Union have addressed gender equality issues, albeit for reasons of competitiveness rather than fairness when equal pay became enshrined in the Treaty of Rome. As a result of years of policy-building, European women today benefit from a comprehensive set of legislation designed to ensure equality in the labour market. Due to a combination of factors, in the 1990s new provisions were added to the Treaties for implementing gender equality in all EU policy fields, which included the need to bring more women into the labour market, strong pressure from a well-developed civil society and the introduction of a human rights framework in the EU. One of the latest pieces of legislation impacting on gender equality was agreed in 2004 and extended protection against discrimination to the provision of goods and services, with the aim of re-

ducing inequalities that women experience in relation to pensions and health care (Council of the European Union, 2004). This paradigmatic shift towards social legislation in the field of gender also marked the beginning of the undoing of the EU's proactive gender equality agenda.

Twelve years on, the picture has changed dramatically: gender equality is today almost invisible on the EU agenda, despite the fact that women across Europe still suffer major inequalities and discrimination and continue to be exposed to many structural and domestic forms of violence. They still earn 16 to 19 percent less than their male counterparts, constitute the majority in part-time or precarious work situations – with the spectre of poverty in old age when they will only be entitled to around 60 percent of the pensions that men receive. Moreover, they continue to be under-represented in most leadership positions, despite the fact that women's educational achievements in the European Union have long surpassed those of men. Finally, violence against women has not only increased, but has found more diverse and subtle forms in this digital and globalised world.

The narrative on the important link between a greater participation of women in the labour market and more economic growth is only espoused rhetorically by leading EU decision-makers. Meanwhile actual policies are chipping away at the hard fought-for achievements of the last three decades. During the last eight to ten years the EU has experienced some cataclysmic changes (enlargement) and multiple crises (financial, economic, social and political). Instead of opting for a change of policy away from the dominance of economic liberalism – which came to the fore in the 1980s – policy-makers pursued the fiscal austerity route with even greater vigour. They turned a blind eye to the fact that there was something intrinsically wrong with the system, evidenced by the contagious and uncontrollable subprime crisis that reverberated around the globe. We now know that austerity has not led to any significant growth or private investment encouraged by public monies, which are key to stimulating growth. Moreover, women have been disproportionately affected not only by the crisis, but also by the political response to it. Im-

portant public investments in key social services have been significantly reduced, public sector jobs held by women have been cut and the institutional infrastructure in support of greater gender equality has been dismantled. As such, women were affected by crisis and policy response in multiple ways.

## 2. The Undoing of a Success Story

If the success of a policy is measured by the dynamic interactions between Institutions, interests and ideas, gender equality has recently lost on all three grounds (Palier and Orloff, 2009):

**Institutionally**, the undoing of the EU gender equality infrastructure began in 2005, when the remit of the European Commissioners Group for Gender Equality was broadened to general discrimination. The Group was subsequently dissolved in 2010. In its 20 years of existence, the Group had played a leading role in mainstreaming gender into many EU policy areas (e. g. regional policy, employment strategy, research, co-operation). In addition, the Group afforded political weight to the issue, contributing to its success. The dismantling of the Group was followed by a move of the gender equality policy unit from the Directorate-General for Employment, Social Affairs & Inclusion (DG EMPL) to the Directorate-General for Justice and Consumers (DG Justice) of the European Commission. This move further weakened the machinery that had been progressively established to promote gender equality, implement gender mainstreaming and eliminate discrimination between women and men. All this constituted a change in approach on gender equality: while it had previously benefitted as a specific policy in the context of employment and social policies, it was now an issue subsumed under the umbrella of anti-discrimination. Finally, the 2010–2015 'Strategy for Equality between Women and Men', a document normally approved at the highest political level, was relegated to a staff working document. It was published as a 'strategic engagement' for gender equality (2016–2019), under the lowest official status document and without the agreement of the College of Commissioners, let alone any ministerial agreement in the Council. Repeated pressure by a wide range of

civil society organisations and trade unions could not change the political will of the dominant Commissioners. The withdrawal of the maternity leave directive at around the same time only confirmed the impression that dismantling gender equality as an EU policy was institutionally orchestrated by a weak Commission that had granted it very low status.

**As far as interests were concerned**, the crisis and ensuing policy responses also had serious implications for organised civil society. In this context, it became particularly difficult to argue for a specific gender equality policy, as attention had turned to ‘discriminated groups’, with women subsumed as one of them. At a national level, this approach led to the merging of gender equality bodies into anti-discrimination bodies, which further weakened the case for gender equality. At the same time, budgetary support for stakeholders were reconsidered across the board, and adjusted to match the new political focus and further undo the equality framework. The situation was further aggravated by the impact of increasing inequalities that raised the question for the main stakeholders of how to adjust to both policy changes and widening inequalities, including among women themselves. The result was that organised civil society – and in particular women’s organisations – were struggling to survive. The European Women’s Lobby was also still operating on a budget that had been conceived for 15 Member States, rather than for the current 28.

**In the field of ideas**, the active participation of gender researchers in the development of EU policies was key to its past success. It was the Commission – and in particular committed feminists working in the Commission – who actively sought out the researchers’ input through the creation of a number of expert networks. These networks not only identified knowledge gaps but also helped to fill them. Of the nine networks operating at the end of the third action programme for equality between women and men in 1996, only one was still running in 2015. Feminist researchers are essential for developing effective policies. With their healthy distance from day-to-day politics, feminist economists over the last decade have concentrated on care issues and the reproductive economy, subjects

that had been marginalised by policy-makers in mainstream economics, particularly in times of financial crisis. Paradoxically, macroeconomic models and the generation and redistribution of public resources at national or EU level have not benefitted from feminist input. Catching up now, some recent feminist research concentrates on the implications of the crisis from a gender perspective and the analysis of responses and possible alternatives. Recent studies on the care economy analysed the employment growth potential in the care economy and convincingly showed that an investment there of two percent of GDP in just seven countries would create over 21 million jobs. Furthermore, it would help countries to overcome the twin challenges of ageing populations and economic downturn (De Henau, Himmelweit, Łapniewska, Perrons, 2016; De Henau, 2016).

### 3. Gender-blind Governance: A Recipe for Failure

Over the last decade, mainstream economists and EU finance ministers repeatedly promoted growth-friendly fiscal consolidation, employing buzzword concepts such as ‘restoring the lending capacity to the economy’, ‘growth and competitiveness’ and ‘modernising public institutions’. It is therefore not surprising that action aimed at achieving these goals has dominated the EU institutional response to the crisis. The social impact has consequently been neglected and relegated to a matter of ‘national responsibility’.

Coordination of macroeconomic policies based on control of excessive budget deficits and public debt is not new: in fact it has been on the European agenda since the Maastricht Treaty, as a constituent element of the European Monetary Union (EMU). With the onset of the financial crisis, these elements became key factors in what came to be known as austerity policy. Almost a decade later, austerity policy is still on the agenda today, although it has not succeeded in putting Europe back on the road to economic recovery. Belief in the success of austerity policies, however, is beginning to wane. Mainstream economists and the ‘Five Presidents’ Report’ have begun to embrace alternatives to austerity measures (European Commission,

2015). The report soberly concludes that the policy not only failed to create the desired number of jobs and growth, but that cuts in public expenditure have impacted education and training programmes to the extent that they are threatening Europe's future as a knowledge-based society. The three percent and 60 percent limits of budget and public debt levels respectively, measured against the GDP, though rarely respected, have nevertheless constituted the European mantra that has justified the enforcement of austerity policies against the better judgment of heterodox economists such as Joseph Stiglitz, who predicted their negative effect on inclusion and gender equality.

The crisis management process of the European Commission was not only marked by an excessive application of austerity policies, but was also accompanied by an astounding degree of gender blindness. At the outset of the crisis, the EU's first Keynesian response was rapidly replaced by an economic governance process based on the presumed virtues of austerity. The Annual Growth Survey (AGS) and the Alert Mechanism Report (AMR) launch the annual policy cycle of economic governance (called the European Semester) every autumn, setting out the economic priorities for the EU and giving policy guidance for Member States. Year after year since 2010, they have called on Member States to support growth, reinforce economic convergence, create jobs and strengthen social fairness by boosting investment, accelerating structural reforms and pursuing responsible, growth-friendly fiscal consolidation. Instead, they provided the blueprint for a neoliberal agenda to cut public resources and stimulate private initiatives that benefit only a few. Growth was measured by GDP and jobs mainly by hours worked, with no reference to the quality of the work itself. Likewise, investment came from the private sector, with social fairness and responsible growth intended to occur naturally as a result. As formulated in the successive annual exercises, there is little mention of social or environmental sustainability, let alone considerations of redistribution in the face of the exponential inequalities suffered by women and men. The AGS package runs in parallel to the Joint Employment Report (JER), as well as a scoreboard of key employment and social indicators made available together with the Macroeconomic Imbalance Procedure Indi-

cators and auxiliary indicators. The latter are used to identify emerging or persisting macroeconomic imbalances in Member States and subsequently translated into Country Specific Recommendations (CSRs) that provide policy guidance to each Member State. The CSRs have become the central tool for monitoring and influencing policy-making in Member States. Within the Semester process, the approach to gender equality has proved to be piece-meal rather than strategic. In 2016, for example, only four Member States (Ireland, Slovenia, Spain and the UK) received country-specific recommendations on gender equality, with a focus on the provision of childcare while others with similar deficits in child care did not receive any recommendation. In 2015, only Estonia received a recommendation on reducing the gender pay gap, a problem universally shared by all Member States.

In parallel, the Europe 2020 growth strategy for smart, sustainable and inclusive growth agreed in 2010 reinstated social and environmental policies into the EU agenda, with five headline targets. Unlike the European Semester, this is an indicative document. A connection between the European Semester and the Europe 2020 strategy is nevertheless articulated around a scoreboard of key employment and social indicators. Introduced in 2014, this features the five headline indicators of unemployment, youth unemployment, household disposable income, poverty rate (AROPE) and income inequalities. Progress towards the Europe 2020 targets is encouraged and monitored through the European Semester. The Europe 2020 midterm review clearly showed a need to correct the current course, as the objectives agreed in 2010 were far from being reached. The scoreboard was meant to bring a stronger focus on employment and social issues into the European Semester. In the same vein, the Macroeconomic Imbalance Procedure (MIP) scoreboard took on board indicators measuring employment, youth employment and poverty indicators, alongside indicators on gross-fixed capital formation or rates of direct foreign investment. However, gender equality is not measured here, even in employment, inclusion or poverty. This is all the more curious given the existence of a gender equality index established by the European Institute for Gender Equality (EIGE, 2015). While 15 years ago gender equality was one of

the four pillars of the EU employment strategy, the latest Joint Employment Report makes only scant mention of gender equality or gender in employment, with limited information on the decrease in women's participation in full and quality employment or the gender pension gap.

The question that arises in this context is why gender equality – one of the strongest common social objectives of the EU since the Treaty of Rome – rather than being a central component of the macroeconomic recovery strategy, is treated as a mere add-on, as if it does not have a bearing on growth or economic recovery or vice versa.

While institutions and fora such as the OECD, the World Bank and the World Economic Forum, to name but a few, have repeatedly and convincingly argued that gender equality generates growth, European Union policy-makers did not seem to have integrated this thinking into EU macroeconomic policy. The arguments that these organisations use concern formal ways of increasing GDP, by counting the added value that would be produced by the full participation of women in the labour market.

Other examples of the transformative role that gender equality can bring can be found in the Nordic countries. These countries not only benefit from a greater participation of women in employment (i.e. Sweden), but gender equality is also actively promoted both in the public and the private spheres. While the model is not perfect, Nordic countries have come a long way in integrating the cost of a reproductive economy into their national accounts. Hence they experienced a far less drastic impact of the 2008 crisis than other EU countries, and will ultimately be much better off in coping with the demographic and economic challenges of the future.

#### 4. Towards a Gendered Economic Governance Model

Catherine Hoskyns (2008), academic and long-time observer of EU gender policies, describes the European Union as being all about macroeconomic policy. The post-war decision to create an economic union be-

tween previously warring states involved innovative macroeconomic thinking. Today, the success of its macroeconomic policies remains central to the European Union. It cannot however be disconnected from the social and political provisions that are now part of the European Treaties, reinforced in the latest treaties by the integration of the European Charter of Fundamental Rights as Part II.

It is today more widely acknowledged that the neoliberal remedies to the crisis implemented via the post-crisis macroeconomic governance process and austerity programmes have not delivered sustainable solutions. Even with the adjustments brought about by the Juncker College, important social forces remain sidelined by these policies, including in no small measure women in all their diversity. Taking them on board in the design of a future-proof European Union could be key to the political and economic success of the Union in the years to come. The failure of the neoliberal policies in response to the crisis as implemented by the economic governance process put in place since 2010 could open the door to a reconsideration of the process, its objectives and implementation through a gender lens.

Among contributions to alternative economic analyses, Sylvia Walby (2015) makes a strong case for questioning the current growth strategy, by arguing that growth rates are no longer a clear indicator of rising affluence. Material prosperity, she says, has diminishing returns when it comes to happiness and well-being. This idea is also carried by the Stiglitz report, the OECD and a large number of organisations that argue for a measure of growth beyond GDP (Stiglitz, Sen, Fitoussi, 2009; OECD, 2015). The message of progressive thinkers is not necessarily gendered, but as shown by Walby it could have dramatic transformative effects on financial and economic interests as they currently exist. Such alternative pathways could shake up established institutions and further raise considerable resistance, as current policies – guided by neoliberalism tenants – actively discourage the empowerment of women to occupy key positions in the European labour market and economy, and thus to contribute in a major way to the success of the European growth and welfare model.

We believe that gendered policies could become an engine for creative economic solutions while providing political legitimacy, a policy mix that could guide Member States out of the crisis. Our belief is not based on utopian dreams, nor is it grounded in radical feminist thinking. It is rather the logical consequence of: a) the failure to find adequate solutions within the current framework and processes; b) wisdom already anchored for so long in the European Treaties and expressed in treaty provisions espousing the need for gender mainstreaming; and c) experiences with gender-based policies that have proved to be successful, namely in Nordic countries, but which now need to be embraced by the rest of Europe.

Countries such as Sweden, Finland and Norway have long been considered as care-centred economies, focusing on care as an essential category of value creation. This is as opposed to other capitalist markets which largely ignore care as an economic factor (Bollier, 2015; Praetorius, 2015). The success of the Nordic economies stems from the fact that they have committed to public investments in care sectors – including child, health, education and elderly care, thereby lightening the heavy burden of unpaid work performed mainly by women. The underlying assumption is that public investment will create jobs directly in the activities where the investment takes place (for example, in building houses or providing childcare services). Such investments create knock-on or ‘multiplier’ effects on other sectors, as jobs will be created in the industries that supply the necessary raw materials and services for the initial investment. Moreover, the expansion of employment created by these jobs will raise household income, which in turn creates new consumer demand such as food, clothing, housing and care services, among others.

An ITUC study shows that the injection of demand into the economy by government investment will generate employment directly and indirectly and have an expansionary impact on overall demand (De Henau, Himmelweit, Łapniewska, Perrons, 2016). In this way, public investment will expand demand and help lift economies out of recession. Furthermore, countries that have opted for care-centred economies have reduced their unemployment rates, thus making im-

portant savings in social security such as unemployment benefits. Furthermore, people who are in active employment pay taxes and contribute in other positive ways to public finances. In addition, investing in education and childcare generates benefits for society as a whole and on long-term, as educated children grow into more productive, happier adults.

While investing in physical infrastructure – such as the Juncker Investment Plan – promises to bring returns by creating value through building roads and bridges, investing in the care economy may bring similar benefits, as we have shown above. In addition, such an economic model is centred on gender equality, thus integrating the core values of the European Union into a new economic model.

What kind of changes to structures and processes of European governance and policies are necessary to move towards a care economy that is just, inclusive and delivers on economic and financial sustainability?

## 5. Reforming EU Governance from a Gender Perspective

Putting in place revised or new governance structures and processes takes time, which we do not necessarily have. It is therefore preferable to investigate how existing structures could be used to facilitate a transition away from austerity objectives and towards those aims that define a care economy. Rather than advocating a futuristic scenario that may have no relation to the actual political context, we have argued that the seeds of reform can already be found in the current treaties of the European Union (i.e. gender mainstreaming). Moreover, both the semester process and ongoing efforts by the Juncker Commission may also lend themselves to refocus on the EU’s social dimension and its potential as an engine for growth, with gender equality at its centre.

We therefore propose that the starting point be the European Treaties – an agreed commitment by EU leaders which has so far not seen any serious implementation. However, if correctly and consistently applied, gender mainstreaming offers a most innovative

set of policy approaches to the current crisis. As we know, innovation is central to the Juncker Commission's agenda. There is enough research on gender mainstreaming and its implementation to design inclusive ways to address economic and political governance in the EU. In the last twenty years, the concept of gender mainstreaming has been thoroughly analysed by European gender scholars, taking into account measures taken at the planning stage and the respective situations of women and men, as well as the outcomes. The results are telling: where it has been seriously applied, we have seen positive outcomes.

In the 1980s, feminist economists started to question the neutrality of economic analysis and policies in a number of fields (such as international trade), raising awareness on discrimination resulting from the invisibility of unpaid work done mainly by women, and the undervaluation of the caring sector (Waring, 1988). Since the 2008 crisis, which called into question the efficiency of neoclassical mainstream economics, they pointed to the inefficiency of systems that generate inequity. These analyses provide the necessary understanding and knowledge on which to build more robust economic and financial policies.

The announcements by the Juncker Commission to aim at a triple A social policy and to make proposals for a minimum wage and reconciliation measures are steps in the right direction. However, this could prove to be too little too late, as citizens have come to believe that the EU is mainly about austerity programmes and 'governing by numbers' in a neoliberal world which they perceive as having a mainly negative impact on their lives.

Likewise, the Juncker Investment Plan, though it has great potential, fails to reach those women and men who could actually boost the financial and economic resilience of Europe by carrying out quality work (namely in the care sector) while developing people's full capacity, both as workers and as carers. Juncker's plan, focused mainly on infra-structural investment, leaves these very people behind, despite the fact that they are at the heart of the European economy. It favours infrastructural investment over investment in human capital. Most economists will agree that mo-

bilising public investment in particular – supported by the private sector – to stimulate growth is the way to go. It is time to reconsider outdated assumptions and shift the focus of investment to the caring sectors and human capital.

### Who Should Drive the Process?

Governance processes do not change overnight, but can evolve given the right institutional framework driven by political will. The current Commission has made a pledge to have 40 percent of women in the highest decision-making positions, which is an important component of a transformative strategy. Moreover, building on the previously successful **Group of Commissioners for Gender Equality**, which existed from 1995 to 2005, decision-making structures within the European institutions could play a crucial role in driving a politically ambitious process of transforming policies.

Such a 'political' structure could be given the mandate to drive the proper implementation of gender mainstreaming within the policy remit of the **European Commission**, starting with the European Semester process. Integrating the consideration of **gender equality into the different instruments and scoreboards that** feed their information into the Semester process could have an inherent effect on making country reports and country specific recommendations more relevant to people's needs. Any subsequent success would depend on proper target setting at different levels and a **mechanism to enforce these**, including automatic adjustment mechanisms. In this context, it is advisable to consider creating a **Specific Task Force for Gender Mainstreaming to assist the political structure**, as the collection and analysis of data and policy options could require a large mobilisation of resources, at least in the initial stages.

**Gender budgeting**, which is implemented in a large number of cities or regions, creates a lever to expose and correct inequalities and allocate resources in a more equitable fashion. The relevance of the distribution of funds at EU level could be enhanced, providing support for the next multi-annual financial framework. This should be an occasion to start shifting the

focus away from traditional investments and to investments in people.

The scope of such a policy 'experiment' is much wider than the corporatist's interests of one class of citizens. It would also be a clear sign that social justice is a major concern of European institutions. Furthermore, it could lay the foundations for a stronger and more sustainable economy, one made to serve society and not the reverse. After all, the stated purpose of economics is the satisfaction of human needs.

Alliances between the gender equality movement and other civil society actors involved in the struggle against the neoliberal economic model are important in supporting institutional moves towards a more human-centered societal model. However, and insofar women are the first victims of individualism, sexism and consumerism, they can and will be a driving force towards a new economic model.

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