

EIGE's methods and tools



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This publication is available online through EIGE's Gender Mainstreaming Platform: <http://eige.europa.eu/gender-mainstreaming>

The European Institute for Gender Equality created the online Platform on Gender Mainstreaming to support the EU institutions and governmental bodies with the integration of a gender perspective in their work. The Platform provides insights on the relevance of gender in a variety of policy areas and offers online tools for gender mainstreaming.

The Platform helps to improve individual and institutional competences to mainstream gender into the different sectorial areas and throughout the different stages of the development of any policy/programme/project. Understanding how to design, plan, implement, monitor and evaluate policies from a gender perspective will strengthen EU policies, increasing their societal relevance and responsiveness.

European Institute for Gender Equality

The European Institute for Gender Equality (EIGE) is the EU knowledge centre on gender equality. EIGE supports policy makers and all relevant institutions in their efforts to make equality between women and men a reality for all Europeans by providing them with specific expertise and comparable and reliable data on gender equality in Europe.

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1. Introduction

Introducing gender mainstreaming methods and tools

One of the main difficulties in implementing gender mainstreaming is that it often remains a very abstract concept. It is not enough to simply state that gender mainstreaming needs to be implemented; persons responsible for gender mainstreaming require specific instructions about what exactly is meant by this and what they are expected to do. Gender mainstreaming methods and tools can be of vital assistance as they offer clear guidance on how to implement gender mainstreaming in practical terms. They support a systematic implementation of gender mainstreaming in a particular field of activity or sector.

The aim of using gender mainstreaming methods and tools is to shape an organisation's processes and operational workflows in such a way that the results and effects of the organisation's work better meet gender equality objectives.

Key aspects

Gender mainstreaming cannot be implemented with one single tool. Since it is a process whereby a gender equality perspective is integrated into a range of different processes and tasks, a variety of methods and tools that support its implementation are therefore used in the different operational workflows of a particular field of activities.

It is vital to select methods that suit the specific procedures and working routines of a particular organisation and to develop tools that have been custom-made to suit requirements. The long-term aim is that gender mainstreaming methods are incorporated directly into existing processes, workflows and specialist subject content. This is so that gender mainstreaming is not seen as an 'extra task', but one that is fully integrated into standard working routines.

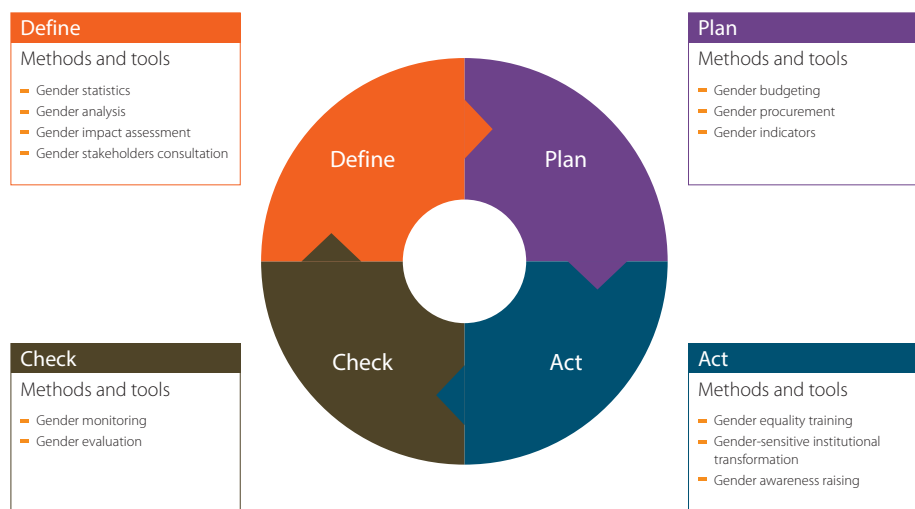
These methods and tools should be systematically and authoritatively applied in order to ensure the success of gender mainstreaming. This means that the operation should not be run sporadically or inconsistently, but rather it

should be continuously and systematically integrated into the respective stages of routine procedures. It also means that its application is mandatory and that it can have a genuine influence on planning and decision-making. So much so that, for instance, the findings of a gender impact assessment are incorporated into further measures planning and can also lead to changes being made to planned projects where necessary.

EIGE's collection of methods and tools

In this part of the gender mainstreaming platform you can find a collection of gender mainstreaming methods and tools to be used within each of the gender mainstreaming cycle stages. A gender mainstreaming cycle model consists of a series of defined steps to describe how the gender dimension can be integrated into the process of defining, planning, implementing and checking certain policies, programmes or projects. Gender mainstreaming methods and tools serve to make the entire gender mainstreaming process more understandable in a policy, programme or project development. A well-founded implementation of gender mainstreaming cannot be achieved merely by ticking off check lists. Gender mainstreaming methods and tools add weight to the discussion by posing equality-related questions throughout all stages of the cycle.

Consult our practical guide on the integration of the gender perspective into the policy/programming cycle to read about this process and learn which gender mainstreaming methods and tools should be used within each of the policy cycle stages.



2. Methods and tools

Gender awareness-raising

According to the Council of Europe ⁽¹⁾, awareness-raising aims at showing how existing values and norms influence our picture of reality, perpetuate stereotypes and support mechanisms (re)producing inequality. It challenges values and gender norms by explaining how they influence and limit the opinions taken into consideration and decision-making. Besides that, awareness-raising aims at stimulating a general sensitivity to gender issues.

Make sure that your communications and publications are gender-sensitive. Language has a powerful influence on the way we think. Disregarding one of the sexes in speeches or referring to a group of people using allegedly universal expressions (e.g. 'workers', 'patients', 'the poor', 'victims of crime') might have serious consequences on how the needs of women or men are addressed.

The use of a universal masculine is institutionalised in our language and is unconsciously biasing our thoughts. The need to use non-sexist language was recognised in 1987 on the occasion of the 24th session of the UN General Conference. A resolution resulted from this session inviting the Director-General 'to adopt a policy related to the drafting of the Organisation's working documents aimed at avoiding, to the extent possible, the use of language which refers explicitly or implicitly to only one sex except where positive measures are being considered'. In the same year, Unesco issued guidelines on gender-neutral language, which were later (in 1999) edited. Some indications on gender-neutral language from the Publications Office of the European Union can be found in the EU's *Interinstitutional style guide* ⁽²⁾.

Strive to choose non-sexist words and expressions in all documents for internal and external use in order to avoid biased, discriminatory or demeaning interpretations. Gender proofreading can also be considered. Ensure that sex/gender differences and inequalities are made visible and appear clearly in publications of the policy sector.

In addition to ensuring the use of a gender-neutral language, the choice of images must also be considered critically. Many images portray gender stereotypes that diminish the role of and/or that exert violence against one of the sexes. Try to choose images that portray a balanced representation of both sexes, do not convey stereotypical portrayals (e.g. men as bus drivers) and do not discriminate

or demean a person (e.g. a woman of different ethnic origin as a domestic worker).

Check out Unesco's priority gender equality checklist for publications (p. 7) to assist you in taking gender into account in your publications.

When organising events, like conferences, think carefully about the list of speakers: who has been invited to speak? Is there a good balance between male and female speakers? Are female experts given sufficient attention? How is the speaking time distributed?

Gender-sensitive stakeholder consultation

Stakeholder consultation helps to make EU law and policy-making transparent, well targeted and coherent. Consultations — together with impact assessments, evaluations and expertise — are a key tool for transparent and informed policymaking. They help you take decisions that respect principles of proportionality and subsidiarity and that are based on evidence, experiences and the views of those affected by the policies, and those who are involved in their implementation. Stakeholders include: gender experts, women's organisations, other civil society organisations, social partners.

Stakeholder consultations are a part of the participatory approach to gender mainstreaming. Close liaison with all policy stakeholders is essential throughout the policy cycle to take on board the concerns, expectations and views of the various target groups. It is recommended that opportunities and structures for stakeholder involvement and consultations be incorporated into the policy processes.

Find out how the European Commission consults with stakeholders at: http://ec.europa.eu/info/law-making-process/planning-and-proposing-law_en

⁽¹⁾ <http://www.coe.int/en/web/genderequality>

⁽²⁾ <http://publications.europa.eu/code/en/en-4100600en.htm>

Gender procurement

Basic principles governing public procurement contracts require that they should always be awarded in observance of the principles of equality and non-discrimination, transparency, competition and a flat-rate basis.

Public procurement has great potential to promote gender equality. Whenever possible, it is important to incorporate gender equality in the subject of the contract itself. This will allow the incorporation of gender equality clauses requiring gender-technical competence to the awarding entities, as well as the inclusion of gender criteria for the evaluation of the submitted proposals and for further implementation.

However, this is not always easy or possible. Therefore, it is important that gender equality clauses are incorporated into the conditions for the implementation of the contract. This would affect any contract and would ensure that public procurement becomes an instrument for gender equality.

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

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

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

- gender-balanced composition of the project team and beneficiaries;
- balanced presence of women and men in decision-making positions;

- specific analysis of gender-related concerns in the project and in the reports:
 - o mapping of the situation of women and men in the concerned area;
 - o elaboration of gender-specific objectives in line with the latest findings and with the objectives of the call;
 - o explanation of how these objectives have been achieved;
- use of sex-disaggregated data and gender indicators;
- the application of user-centred and/or participatory methodologies which take into account a gender dimension by directly involving a fair share of women in the process and by looking at how gender inequalities/differences are structuring the domains and the contexts of a particular policy area;
- preference given to women when hiring staff in male-dominated sectors.

The contract negotiations with applicants whose proposals were selected for funding are a very important phase, in which significant improvements to project plans can be realised. Thoroughly address the gender equality concerns in contract negotiations with applicants. If needed, demand corrective measures before signing a grant agreement.

Further reading:

Equal opportunities for men and women in public procurement contracts: a few recommendations
<http://igvm-iefh.belgium.be/sites/default/files/downloads/20%20-%20Public%20procurement%20contracts.pdf>

Gender indicators



Gender indicators are established to measure and compare the situation of women and men over time. Gender indicators can refer to quantitative indicators (based on statistics broken down by sex) or to qualitative indicators (based on women's and men's experiences, attitudes, opinions and feelings).

Indicators play a crucial role in the gender mainstreaming process throughout the policy cycle. Quantitative and qualitative indicators must enable ongoing monitoring and evaluation of whether the project's gender equality objectives are being met and assess the gender effect of project activities. If objectives are not being met, it could be necessary to reassess the project strategy and make amendments in order to ensure improvements.

Quantitative approaches

Quantitative methods of data collection produce quantifiable results, so they focus on issues which can be counted, such as percentages of women and men in the labour market, male and female wage rates or school enrolment rates for girls and boys. Quantitative data can show changes in gender equality over time — for example, an often used quantitative indicator is the number of girls in school compared to boys.

Qualitative approaches

Qualitative methodologies capture people's experiences, opinions, attitudes and feelings — for example women's experiences of the constraints or advantages of working in the informal sector or men's and women's views on the causes and consequences of the under-representation of women in higher positions. Often participatory methodologies such as focus group discussions and social mapping tools are used to collect data for qualitative indicators. Qualitative data can also be collected through surveys measuring perceptions and opinions.

Gender-sensitive indicators allow you to measure changes in the relationships between women and men with regard to a certain policy area, a specific programme or activity or changes in the status or situation of women and men. As a measure of social change and the performance/effectiveness of projects, gender-sensitive indicators can be described in terms of:

- the derived quality to be reached;
- the quantity of something to be achieved;
- the target group that is affected by or benefits from the project; and

- the time frame envisaged for the achievement of the objectives.

Find out more about EIGE's collection of indicators to monitor progress towards the achievement of the goals of the Beijing Platform for Action at: <http://eige.europa.eu/gender-statistics/women-and-men-in-the-eu-facts-and-figures>

Further reading:

A project level handbook — the why and how of gender-sensitive indicators: [http://www.acdi-cida.gc.ca/INET/IMAGES.NSF/vLUIImages/Policy/\\$file/WID-HAND-E.pdf](http://www.acdi-cida.gc.ca/INET/IMAGES.NSF/vLUIImages/Policy/$file/WID-HAND-E.pdf)

3. Gender monitoring



A gender-sensitive monitoring is a systematic and objective assessment of the design and planning (objectives, results pursued, activities planned) and the implementation and results of an ongoing activity, project, programme or policy from a gender perspective. It takes into account the information and data collected and collated in the course of different planning and implementation phases of the policy or programme, as well as other knowledge and sources. Persons responsible for monitoring should have gender expertise and the criteria for monitoring, methods and reports should integrate gender equality considerations.

Monitoring exercises occur periodically and are aimed at following up the implementation of a policy or a programme. This includes data collection and information based on the defined gender equality objectives and indicators, in order to verify whether the plan is being followed and whether the objectives are being achieved. Importantly, it allows you to immediately address identified problems and to introduce changes in order to accomplish what has been established.

How to build up a set of indicators for gender-sensitive monitoring

To build up a gender-sensitive monitoring set of indicators means, at the most basic level, that each data set should be disaggregated by sex. In addition, it is also important to choose data that might be useful to measure gender equality in policy implementation and gender mainstreaming principles for the different category of indicators, as follows.

- Context indicators are designed to measure the evolution of the reference group for the policy under scrutiny and, therefore, to highlight the needs expressed by the population. In a gender perspective, context indicators are aimed at monitoring the position of women in different policy fields and gender gaps.
- Application indicators are aimed at measuring the characteristics of the target population. It is important to use these indicators to underline the features of the target female population and any differences with the male population.
- Process indicators are used to measure management efficiency. This process involves indicators regarding the operational aspects of intervention implementation: administrative and financial management mechanisms; the institutional actors involved; the information system implemented; the level of distribution and the capacity to reach the target population (measure promotion and distribution activities, ease of access to the project, participation procedure complexities, project and participant selection methodologies); the effective content of the services; the speed of administrative action (average delay between the application presentation, financing and intervention implementation); the capacity to retire the user until the end of the project; the amount of residual resources; the state of the financial and fiscal progress of the project (planned and effective spending flows, number of users that join and leave the programme, etc.). It is useful, even with this type of indicator, to monitor the mainstreaming quality of the programme: process indicators disaggregated by gender let us understand how many financial and human resources are dedicated to gender goals.
- Result or output indicators describe the product obtained at the end of the projects — for example, the number of orientation or training hours offered per user, the number of places in nurseries, the price and the length of the recruitment contributions, etc. Result indicators are important to capture the traits of the female users in relation to the population and to measure and describe the relationship between the objectives of the projects and the results obtained (for example, the number of women who have completed the training course or who have abandoned it, etc.).
- Efficiency indicators that measure the relationship between the resources used and the results. Some examples are the effective cost per intervention in relation to the estimated cost and the cost per capita of the intervention for each user category divided by gender and within gender.

Further reading:

Monitoring progress towards gender equality in the sixth framework programme — synthesis report (http://ec.europa.eu/research/science-society/document_library/pdf_06/gender-monitoring-studies-synthesis-report_en.pdf).

4. Gender evaluation



A gender-sensitive evaluation is a systematic and objective assessment of the design and planning (objectives, results pursued, activities planned), the implementation and results of an ongoing or completed activity, project, programme or policy from a gender perspective. It can take place either upon completion of the project, when focus is placed on gender impacts and the contribution of the programme to promoting gender equality, or throughout project implementation, with the aim of seeking to have a process of continuous improvement. It can also take place *ex ante* in order to evaluate how a policy can affect gender equality in a specific field. An evaluation exercise must take into account the indicators delineated in the planning phase and the information and data collected in the course of the policy or programme, as well as other knowledge and sources.

Evaluators should have gender expertise and the evaluation criteria, questions, methods and reports should integrate gender equality considerations. The evaluation report should be based on qualitative and quantitative data, disaggregated by sex, to measure results and long-term outcomes for both women and men. Ideally gender equality issues should be mainstreamed in all sections of the evaluation report, rather than only mentioned in a separate section on gender. Make your evaluation reports publicly available: this will build confidence between your institution and the target group(s) of your policy or programme.

Examples of gender-sensitive evaluation criteria

Widely used evaluation criteria are: relevance, efficiency, effectiveness, impact and sustainability.

- **Relevance:** Has the project/programme effectively contributed to the creation of favourable conditions for gender equality? Did it respond to the practical and strategic gender needs of women? Did it contribute to

the national and EU policy commitments and mandates regarding gender equality? Was the treatment of gender equality issues throughout the implementation phase logical and coherent? Were adjustments made to respond to external factors of the project/programme (e.g. economic crisis, new government, etc.) that influenced gender relationships?

- **Efficiency:** Has the implementation of the policy been efficient with respect to gender equality? Are the means and resources being used efficiently to achieve results in terms of improved benefits for both women and men? Have the results for women and men been achieved at reasonable cost and have costs and benefits been allocated and received equitably?
- **Effectiveness:** Did the project/programme results turn out to be effective in achieving gender equality? Have the results contributed to the achievement of the planned results and outcomes and have benefits favoured male and/or female target groups? Did stakeholders (organisations, institutions, indirect target groups) benefit from the interventions in terms of institutional capacity-building in the area of gender mainstreaming and the development of gender competence among their staff?
- **Impact:** What has been the impact of the project's outcomes on wider policies, processes and programmes which enhance gender equality and women's rights? For example, did it have an impact on reducing violence against women? Did it contribute to a more balanced distribution of unpaid care labour and family responsibilities between women and men? A gender-specific *ex post* evaluation can also be used for projects/programmes without a gender equality perspective and will assess whether these have produced any (positive or negative) unintended or unexpected impacts on gender relations.
- **Sustainability:** Are achievements in gender equality likely to be sustained after funding ends? To what extent has ownership of the policy goals been achieved by male and female beneficiaries? To what extent have the strategic gender needs of women and men been addressed through the project and has this resulted in sustainable improvement of women's rights and gender equality? To what extent has capacity for gender mainstreaming through the project been built and institutionalised?

5. Gender analysis



When setting up a project, an essential first step for ensuring that it meets gender equality requirements is to conduct a gender analysis of the issue being addressed by the project. Gender analysis helps gain an understanding of the different patterns of participation, involvement, behaviour and activities that women and men in their diversity have in economic, social and legal structures and the implications of these differences.

Gender analysis provides the answer to how the gender perspective should be addressed throughout the project, particularly in terms of setting relevant gender equality objectives and indicators, planning concrete actions to reach the objectives and conducting monitoring and evaluation.

The gender analysis should not only describe the current state of the gender situation but should also explore the causes and effects of gender disparities on the target population. Looking at the reasons behind inequalities and discrimination helps to set relevant and targeted objectives for resolving them and determine which activities may contribute to eliminating such inequalities.

When carrying out the project's problem analysis, the gender perspective must be integrated. This can be achieved by:

- ensuring that all data used in the analysis is broken down by sex (sex-disaggregated data);
- drawing on existing qualitative and quantitative research findings in the topic area to establish whether information on differences in the situation of men and women is also identified;
- where differences between women and men are found, analysing them, in order to establish both their causes and effects;
- making sure that relevant gender issues, gaps and inequalities in the area of intervention are included and integrated into the full problem analysis.

The analysis can be carried out by the project team but can also benefit from the input of gender specialists. If gender specialists are involved, it is important that their findings are discussed with the project team, in order for the results to be shared and fully understood by all key project stakeholders.

Explore the dimension of the representation of women and men in different policy sectors at different levels — as their beneficiaries, representatives of the labour force and decision makers. More specifically:

- define in which way your policy is person-related;
- describe how your policy will affect the everyday lives of men and women or specific groups of men and women (e.g. disabled, black and ethnical minorities, low-income, LGBT and so on);
- define the differences between women and men in the policy sector (with regard to rights, participation/representation, access to and use of resources, values and norms that affect gender-specific behaviour);
- identify gender gaps among professionals (e.g. wages and access to hierarchical positions) in the main institutions in the sector;
- identify the role of women in management at the local and national levels in the sector;
- consider the governance of an institution through a gender lens to assess whether selection, appraisal, promotion and evaluation practices may reflect gender stereotypes that disadvantage both female employees and managers.

Further reading:

Learning and information pack: gender analysis, United Nations Development Programme, Gender in development programme, January 2001 (<http://www.undp.org/content/dam/undp/library/gender/Institutional%20Development/TLGEN1.6%20UNDP%20GenderAnalysis%20toolkit.pdf>).

March, C., Smyth, I. and Mukhopadhyay, M., *A guide to gender-analysis frameworks*, Oxfam, 1999 (<https://www.ndi.org/files/Guide%20to%20Gender%20Analysis%20Frameworks.pdf>).

6. Gender budgeting

According to the Council of Europe ^(?), gender budgeting is the application of gender mainstreaming in the budgetary process. It means a gender-based assessment of budgets, incorporating a gender perspective at all levels of the budgetary process and restructuring revenues and expenditures in order to promote gender equality. Gender budgeting is conducted in three stages.

Stage 1: Analysing the budget from a gender perspective

The first level of analysis is to produce a sex-disaggregated report of end users or recipients of budget programmes. Probing deeper from a gender perspective, the analysis can go on to demonstrate:

- the degree to which the budget has satisfied the needs of the recipients;
- how the gendered needs and roles of the recipients contribute to the level of satisfaction;
- the challenges and barriers faced by those in the target group who have not accessed services;
- the degree to which the budget has reduced, exacerbated or left unchanged gender inequality;
- the relationship — more often than not, the disconnect — between stated policies, particularly gender equality policies and budgetary decisions;
- why the budget needs to take account of the differing participation rates of women and men in the care economy.

Stage 2: Restructuring the budget based on gender analysis

Where analysis reveals that budget resources have not been distributed in a gender equitable way, a response from the budget is required to redress the inequity. Where the distribution of budget resources does not match the government's gender equality policies, realignment is required. Once the differential impact of the budget on women and on men is revealed, there is an obligation to incorporate gender as a category of analysis within the budgetary processes.

Stage 3: Mainstreaming gender as a category of analysis in the budgetary processes

Gender budgeting is not just about the content of budgets; it is also about the processes involved in budget-making. This is the work of mainstreaming gender budgeting. It requires an ongoing commitment to understanding gender, which includes analysis and consultation and ongoing budget readjustments to take account of the changing needs of women and men, boys and girls.

If you want to know more about the practical implementation of gender budgeting, have a look at this resource from the Council of Europe.

Sex-disaggregated data

Any data on individuals broken down by sex. Gender statistics rely on these sex-disaggregated data and reflect the realities of the lives of women and men and policy issues relating to gender.

Data collected and tabulated separately for women and men. They allow for the measurement of differences between women and men on various social and economic dimensions and are one of the requirements in obtaining gender statistics. However, gender statistics are more than data disaggregated by sex. Having data by sex does not guarantee, for example, that concepts, definitions and methods used in data production are conceived to reflect gender roles, relations and inequalities in society.

Gender statistics

Statistics that adequately reflect differences and inequalities in the situation of women and men in all areas of life. Gender statistics are defined by the sum of the following characteristics: (a) data are collected and presented disaggregated by sex as a primary and overall classification; (b) data are reflecting gender issues; (c) data are based on concepts and definitions that adequately reflect the diversity of women and men and capture all aspects of their lives; and (d) data collection methods take into account stereotypes and social and cultural factors that may induce gender biases (some examples of sex bias in data collected are: under-reporting of women's economic activity; undercounting of girls; their births or their deaths; or under-reporting of violence against women).

Find out more about gender statistics at the EIGE's gender statistics database at: <http://eige.europa.eu/gender-statistics/women-and-men-in-the-eu-facts-and-figures>

^(?) <http://www.coe.int/en/web/genderequality>



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