

# Gender Budgeting

## Fictional case study 3: balancing care for oneself and others

### Step 1: Understand the dynamics

Tomás is a 74-year-old retired payroll clerk. His monthly income of EUR 850 is just over Spain's national minimum of EUR 785<sup>[1]</sup>. He is a full-time carer for 73-year-old Isabel, his wife of 52 years. Her long-term illness has left her with multiple care needs.

In Spain, 16 % of men are over the age of 65, as are 31 % of women. The average life expectancy is 80.5 years for men and 86.3 for women<sup>[2]</sup>. Although Isabel has been unwell for a long time, Tomás is worried that she might out live him. After all, he is older and being a long-term carer has an impact on carers' life expectancies.

Tomás and Isabel live on the outskirts of a large city, with regular transport links into the city. Their son and daughter live at opposite ends of the city. They have four grandchildren, aged 12-19, who are in full-time education. Their daughter, Asunción, works part-time so she can help her father with household chores and her mother's medical appointments. Their son, Miguel, visits at weekends and is on call for evening emergencies.

### Step 2: Identify gender-aware actions and responses

From the range of possible interventions under the ESF+ and/or ERDF for work-life balance, what ESF+ and ERDF-funded actions would make a difference to Tomás and Isabel, and their family, by providing peace of mind and easing the pressures of balancing work and family life?

### Step 3: Take action

- Under the ERDF, clean urban transport infrastructure is a priority
- Other social infrastructure that contributes to social inclusion in the community is

possible under ESF+ policy objective 3, as are provisions for improving health infrastructure, including the digitisation of healthcare and measures to improve access to long-term care (excluding infrastructure). Additional ERDF support could be allocated to support technical innovation by health and social care SMEs

- Funded interventions that enable people to balance inter-generational care needs with work and individual household needs could include improvements in communications technology to allow remote care and support; the online ordering of prescriptions and household necessities; and inter-generational care facilities at local level – funded and managed by the public sector – to take pressure off families and provide respite for carers. This is key for women who often work part-time to meet the care needs of others

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## Footnotes

[1] Organisation for Economic Co-operation and Development (2017), Pensions at a Glance 2017: Country profiles – Spain, OECD, Paris. Available at: <https://www.oecd.org/els/public-pensions/PAG2017-country-profile-Spain.pdf>

[2] Eurostat (2018), The Life of Women and Men in Europe: A statistical portrait, 2018 edition, EU, Brussels, Section 1.1. Available at: <https://www.ine.es/prodyser/myhue18/bloc-1a.html?lang=en>

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