

Gender Budgeting

Step 1. Alignment with Partnership Agreements' and Operational Programmes' gender objectives and indicators

It is important to ensure that project applications under each fund specify how the project will address existing gender gaps, or women's and men's specific needs, in the intervention area.

Managing authorities can support project applicants by:

- providing information on gender goals and indicators defined in the PA and OPs;
- providing other gender-related, context-specific information that is relevant to the calls for proposals;
- providing information on how gender aspects should be included in the application, and how these will be evaluated;
- ensuring that applicants have the information and capacity needed to undertake a gender analysis of the intervention area.

Step 1a. Conduct a gender analysis

The purpose of a gender analysis^[1] is to identify inequalities and differences between women and men in all their diversity, as well as to establish the underlying reasons for these inequalities. To conduct a gender analysis, you should do the following:

1. Collect information and disaggregated data on the target group

This means statistics that adequately reflect the target group, disaggregated between women and men. They should include data on relevant characteristics, such as age, race, ethnicity, location, education level, employment in different sectors, entrepreneurship in different sectors, salary levels, time use and/or other relevant issues.

When collected and presented, data should be disaggregated by sex as a primary, overall classification. For example, when gathering and analysing data on 'young people' or 'older people', these target groups should be divided by sex.

In addition to quantitative data on specific characteristics, gender analysis needs to take into account qualitative data on people's lived experiences. This includes considering how services are used by differently by women and men, and what resources should be allocated to address these differences. For example, public spaces are used in different ways by different people: older women, older men, younger women, younger men, girls and boys, parents and carers, people travelling to work, etc. Their use of public spaces depends on characteristics such as their sex, age and location. But it also depends on other factors, such as their income levels, their working and childcare arrangements, or the time of day. A gender analysis should take a broad view of what a range of data tells us about people's everyday lives.

Using data from several different sources provides a deeper understanding of gender differences, people's needs and lived realities. Consult as many sources as possible – such as local, subnational and national studies or consultations, data from statistical offices, academic works, policy reports – and combine/triangulate data from these sources.

When disaggregated data on key characteristics – sex, race, ethnicity, age, disabilities, etc. – are not available, this should be identified as a gap. The need for data improvements should be highlighted in project objectives and reporting.

2. Identify existing gender inequalities and their underlying causes

Once you have the disaggregated data needed to form a clear picture of the target group, use these key questions to better understand some key differences between women and men, and to analyse the reasons for these differences.

What differences are there between women's and men's participation in the labour market? In which occupational areas are women or men predominant?

What are the differences in women's and men's earning levels? Are there significant differences in how many women and men work part-time? Do more women than men have more than one part-time job?

What do data on time use or service use tell us about how women and men allocate their time? What does this tell us about gaps in local services, regarding availability and timings?

Are more women than men providing care for children and other family members?

Which age groups among women and men provide more unpaid care? For example, do younger women provide more childcare than men? Do older men provide care for their spouses? What services might support different people in these roles and enhance their well-being?

How might infrastructure and ICT solutions help to address care pressures, build skills

and expand employment opportunities?

What consequences do the answers to these questions have on the target group, labour market or project?

3. Consult directly with the target groups

Take their views into account when developing project proposals and designing projects.

Useful consultation questions include the following.

What are the target group's lived realities, expectations and needs?

Are these different for women and men?

Does the planned project address the needs of both men and women? Does it take into account their different interests, roles and positions?

How can the project better contribute to meeting women's and men's needs?

When asking these questions, consider inequalities between women and men in access to resources (work, money, power, health, well-being, security, knowledge and education, mobility, time, etc.) and in their exercise of fundamental rights (civil, social and political) on the basis of their sex or because of the roles attributed to them (gender roles).

4. Collect gender-specific data, and data on work-life balance

Use national, regional or local data, time use surveys or other data sources.

5. Draw conclusions on gendered patterns and determine their underlying causes

Consider asking these questions.

What **differences** are there between women and men in the project intervention area?

Are there any specific gendered patterns? Do norms and expectations differ for women and men?

What are the **underlying reasons** for these differences and/or gendered patterns? What consequences do these have for the target groups, the labour market and the project's implementation?

Step 1b. Set gender-specific objectives and indicators

Based on the gender analysis, you will have a strong understanding of differences between women and men, their different needs and gendered patterns. Relate these identified differences and patterns to the objectives of the PA or OP, as well as national or subnational gender equality goals. How will these differences and patterns affect the possibility of achieving the fund's objectives?

Using the findings of the gender analysis, make the project's objectives and indicators gender specific. This means ensuring that the project's objectives contribute to gender equality goals within the intervention area. As noted above, project objectives should be aligned with national and subnational gender goals.

Gender equality project objectives must be tailored to the area of intervention and formulated as objectives on gender equality-related performance, participation and impact. The key question to answer is: what contributions can, and should, the project make to promoting gender equality in the area of intervention?

Gender-sensitive project indicators^[2] allow us to measure changes in relations between women and men, and in their statuses, needs or situations, in the context of the project or activity. 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 affected by, or that benefits from, the project;
- the time frame envisaged for achieving the project objectives.

Footnotes

[1] For more information on how to conduct a gender analysis, consult [Tool 3](#) and see EIGE, Gender Analysis. Available at: <https://eige.europa.eu/gender-mainstreaming/methods-tools/gender-analysis>

[2] For more information on gender indicators, consult [Tool 6](#) and see EIGE, Gender Statistics and Indicators. Available at: <https://eige.europa.eu/gender-mainstreaming/methods-tools/gender-indicators>