

Toolkit for gender budgeting in the EU Funds

EIGE has developed an online toolkit to apply gender budgeting as a gender mainstreaming tool in EU Funds processes.

Who is the toolkit for?

- managing authorities involved in EU Funds programming;
- intermediate bodies implementing EU Funds projects;
- gender equality bodies;
- staff working at EU level with EU Funds.



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What does the toolkit contain?



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The first three sections introduce the concept of gender budgeting and examine its relevance for the EU Funds. Section 4 offers 11 practical tools on gender budgeting, related to:

- the EU regulatory framework;
- national/sub-national programming and project-level support; and
- reporting, monitoring and evaluation.

Each tool highlights good practices from EU Member States and pinpoints links to relevant EU Funds regulations, helping users know why and where to apply the tool. EIGE's gender budgeting toolkit is available in 22 EU languages.

Why a toolkit for gender budgeting in the EU Funds?

The EU Funds are among the EU's primary tools to reduce gender gaps and inequalities. Gender equality is anchored in the Funds' legal and policy frameworks as a vital 'horizontal principle'. This means that gender equality is implemented in a cross-cutting manner across all EU Funds policy objectives.

Gender budgeting in the EU Funds would:

- enable compliance with EU legal requirements;
- promote accountability, results-orientation, and effectiveness in the finance planning and management of EU Funds;
- increase transparency by boosting women's and men's involvement in budget processes;
- aid the EU's objectives of sustainable growth, employment and social cohesion, and well-being of EU citizens; and
- advance gender equality for women and men in all their diversity.



The 11 tools one by one:

Tool 1



EU Funds and EU's regulatory framework on gender equality

This tool outlines the major EU policies and gender-equality objectives relevant for the EU Funds. It aims to help Member States and managing authorities align their planning and implementation of EU Funds programmes with the EU's gender-equality strategies and regulatory frameworks.

Tool 2



Analysing gender inequalities and gender needs at national and sub-national levels

The tool offers guidance on how to analyse gender inequalities and women's and men's different needs in EU Funds programmes. Undertaking a gender analysis ensures that your programming will:

- be evidence-based;
- be of high quality and effective;
- promote gender equality; and target women and men living in underprivileged or disadvantaged circumstances.

Tool 3



Operationalising gender equality in policy objectives and specific objectives/measures

This tool can be used by Member States when developing partnership agreements (PAs), as well as by managing authorities at the national and sub-national levels when developing operational programmes (OPs), to promote equality between women and men in all their diversity across the EU.

Tool 4



Coordination between the EU Funds to advance work-life balance

This tool explores how different funds can be used in coordination to advance work-life balance. It can be used by managing authorities involved in EU Funds programming at the national and sub-national levels. It should be used when developing partnership agreements (PAs) to define the combined usage of funds at the PA, and when formulating operational programmes (OPs) to specify the combinations of funds at the OP level.

At the EU level, it can also be used to follow-up on progress of the directive on work-life balance, as well as more generally on financing for women's and men's equal rights and opportunities for employment in the labour market.

Tool 5



Partnerships and multi-level governance — identifying relevant partners, the role of gender experts and the composition of monitoring committees

This tool could be used by managing authorities to ensure that:

- relevant actors, especially those with gender expertise, are involved in EU Funds' programming and monitoring processes; and
- all organisations involved in the design and implementation of EU Funds programmes integrate gender analysis in their practice.

EU Funds' partners guide programming and implementation, supervise programme performance, approve project selection criteria, and approve evaluation plans. Their role is to ensure the quality of EU Funds processes and alignment with the overarching goals of the EU and Member States.

Tool 6



Developing quantitative and qualitative indicators for advancing gender equality

This tool will help you:

- define specific quantitative and qualitative indicators for advancing gender equality, expanding on already defined common indicators for each fund. This will allow Member States and the EU to follow-up on the funds' contributions to gender equality; and
- align these indicators with national equality priorities. This will allow Member States to follow-up on the funds' contributions to specific national equality priorities.

The tool can be used by managing authorities at the national and sub-national levels when developing programmes to promote equality between women and men in all their diversity. This tool is essential for providing gender-sensitive input for the annual performance review and relevant information for the monitoring committee, as well as for mid-term and ex-post evaluations.

Tool 7



Defining gender-sensitive project selection criteria

This tool can be used by managing authorities and monitoring committees to support the design of gender-sensitive projects and to set gender equality criteria for the selection of projects. This is vital for ensuring that gender equality is integrated as a horizontal principle in all funds' activities.

Tool 8



Tracking resource allocations for gender equality (available at a later stage)

This tool presents a system to track spending on gender-equality objectives within EU Funds programmes. It provides information on financing gender equality objectives in EU Funds programmes, linking the EU Funds to EU policies and the SDGs — particularly SDG indicator 5.c.1 (on countries with systems to track and make public allocations for gender equality). The tool could be used by managing authorities at the budget planning stage and during the expenditure verification and evaluation stage — part of the annual implementation reports (AIR).

Tool 9



Mainstreaming gender equality into project design

This tool will help you translate gender objectives and indicators in partnership agreements (PAs) and operational programmes (OPs) to the project level. It can be used by managing authorities at the national and sub-national levels during the planning, implementation and monitoring stages of a project. It can also be used by managing authorities to offer guidance to local actors and project implementers.

This tool supports the implementation of requirements for gender-sensitive project selection criteria and procedures.

Tool 10



Integrating a gender perspective into evaluation and monitoring processes

This tool can be used by managing authorities and monitoring committees to establish an 'evaluation plan', including for mid-term and ex-post evaluations.

An evaluation plan outlines how a programme will be evaluated, including in terms of its gender objectives and indicators. The plan includes the regular evaluation of programmes — intended to improve implementation quality and inform the design of the next programme phase — alongside a mid-term evaluation in 2024, as well as ex-post evaluations of each programme in 2029. All evaluations should consider a programme's gender equality-related aspects.

Tool 11



Reporting on resource spending for gender equality

This tool presents the most effective approaches to track expenditures on gender equality:

- financial gender audit of the budget;
- tracking financial allocations to promote gender equality (see the description of tool 8);
- gender-focused expenditure incidence analysis.

This tool should be used by managing authorities during the expenditure verification and evaluation stage, as part of annual implementation reports (AIR).

European Institute for Gender Equality

The European Institute for Gender Equality (EIGE) is the EU knowledge centre on gender equality. EIGE supports policymakers 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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