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MANUAL FOR EFFECTIVE GENDER EQUALITY ACTION PLANS AND INDICATORS

2025 Deliverable presenting the
approach and experiences of
the Gender Flagship Project



**GENDER
FLAGSHIP**

GENDER MAINSTREAMING
IN PUBLIC POLICY
AND BUDGET PROCESSES

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About the Capitalise Project

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This manual was prepared as part of the project “Gender mainstreaming in public policy and budget processes” (hereafter referred to as the “Gender Flagship Project”), financed through the Technical Support Instrument (TSI). The project is implemented by Expertise France (EF) in partnership with SG REFORM, the European University Institute (EUI) and the European Institute for Gender Equality (EIGE).

The Gender Flagship Project aims to support Member States in understanding how to advance gender equality by better mainstreaming gender into their policies and budgeting, as well as address any related gaps. It offers technical support for analysing policies and budgets with a focus on gender mainstreaming, ensuring that all citizens, regardless of gender, have the opportunity to fully participate in and contribute to a fair society.

The project works with twelve Beneficiary Authorities (BAs) across nine Member States over a 50-month period (2022-2026). Each BA receives:

- In-depth analysis of current practices and development of tailored Gender Action Plans;

- Technical support from dedicated Local Experts and core Gender Flagship Project team of experts to build capacity and implement tools, such as developing and improving their equality-related programmes and indicators, enforcing gender mainstreaming through developing specific processes (e.g. circulars), developing gender-responsive budgeting methodologies.

In addition, the Gender Flagship Project provides capacity development, through general online training and specific in-person training on the latest trends, methodologies and tools for effective gender mainstreaming. The project also facilitates peer learning and exchanges between countries through study visits and workshops, helping Member States to enhance their targeted approaches in specific sectors, policy areas or regions.



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Abbreviations and Acronyms

BA Beneficiary Authority

EF Expertise France

EIGE European Institute for Gender Equality

EU European Union

EUI European University Institute

ESF European Social Fund

OECD Organisation for Economic Co-operation and Development

SG REFORM Reform and Investment Task Force of the European Commission

SMART Specific, Measurable, Appropriate, Relevant, Time-bound

TSI Technical Support Instrument

UN United Nations

Foreword

This manual for effective **gender equality action plans and indicators** was developed as part of the Gender Flagship Project, funded by the European Union through the Technical Support Instrument (TSI). While it draws extensively on the methodological foundations and implementation experiences from Saxony-Anhalt, it has been revised and expanded to incorporate examples and insights from other beneficiary authorities supported by the project. This capitalisation output aims to support Member States, public administrations and practitioners in enhancing the coherence, measurability and impact of their gender equality strategies and actions. By combining methodological rigour with practical examples, it seeks to contribute to the quality of gender mainstreaming across EU policy and budgetary processes.

The manual focuses on the gender equality action plans implemented by public authorities at national, regional, and local levels. However, the principles, frameworks and tools presented are also relevant and transferable to equality initiatives undertaken by other public institutions and civil society organisations.

The primary aim of this resource is to provide a structured foundation for practice. The manual presents a systematic and conceptual framework for designing gender equality action plans and related indicators. While the guidance presents ideal examples, it is intended to inform practice by illustrating how conceptual models can be adapted to diverse institutional contexts, legal frameworks and administrative systems. Practical examples from the Gender Flagship Project are included to illustrate how various Member States and institutions are applying these methods in real-world settings.

In this manual, gender is understood as being socio-structural. This means that when we talk about (equality between) women and men in this context, these groups are not understood as (binary) gender identity groups, but as socio-structural groups.¹

¹A study published by the Federal Foundation for Gender Equality discusses concepts and the conditions under which the integration of gender diversity policy into gender equality policy strategies and instruments is possible and effective. Pimminger, I. (2024). Geschlechtervielfalt in der Gleichstellungspolitik. Begriffe, Instrumente, Daten https://www.bundesstiftung-gleichstellung.de/wp-content/uploads/2025/07/250724_BSG_Studie_Geschlechtervielfalt-2_Gleichstellungspolitik_2B.pdf

How to read this manual

This manual combines conceptual guidance with practical tools for designing and implementing gender equality objectives and indicators, and – most importantly – for integrating all of these elements into effective gender equality action plans. It is intended for public authorities at national, regional and local levels, but the approaches described are equally relevant to other public institutions and civil society organisations. To help readers navigate the manual's contents effectively, it is useful to keep in mind the following:

STRUCTURE

The manual progresses from concepts to application:

- **Section 1** Introduces the overall context, explaining what gender equality action plans and indicators are, and why they matter.
- **Section 2** Focuses on key gender equality objectives and indicators – presenting the overarching policy framework and requirements for meaningful gender equality indicators.



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Sections 3–5 build on this foundation to guide the design, implementation, monitoring and reporting of gender equality action plans, showing how objectives and indicators are integrated into a coherent planning, design and accountability framework:

- **Section 3** Standards of effective gender equality action plans
 - Section 3.1 sets out the quality criteria for effective action plans (institutionalisation, participation, impact orientation, verifiability).
 - Section 3.2 describes the core elements needed to make action plans operational and sustainable.
- **Section 4** Designing impact-oriented gender equality action plans
 - Section 4.1 highlights the purpose of a structured set of objectives, linking key objectives to sectoral objectives and to targets for individual measures.
 - Section 4.2 introduces the use of a logic model to connect resources, actions and expected results in a clear impact pathway.
 - Section 4.3 shows how to combine structured objectives and a logic model into an integrated impact model.
- **Section 5** Making gender equality action plans measurable and accountable
 - Section 5.1 provides guidance on setting up robust reporting systems, including completeness, clarity, substantiation, regularity, institutionalisation and transparency.
 - Section 5.2 provides guidance on setting up robust reporting systems, with regard to completeness, clarity, substantiation, regularity, institutionalisation and transparency.
- The **Annex** offers case studies from the Gender Flagship Project, demonstrating how the concepts and tools have been applied in diverse institutional and national/regional contexts.

HOW TO USE THE MANUAL

- If you are new to the subject, read sequentially to understand how objectives, indicators and action plans are linked.
- If you are seeking guidance on a specific aspect (e.g. defining indicators, designing logic models, setting up reporting), refer directly to the relevant section.
- Use the case studies in the Annex for concrete examples of how the Gender Flagship Project approached some of the aspects.



Section 1



INTRODUCTION



Gender equality is a fundamental right and a core value of the European Union, embedded into its founding treaties and legal frameworks. In support of these principles, the European Commission's 2025 Communication "[A Roadmap for Women's Rights](#)"² reaffirms the EU's long-term commitment to gender equality by outlining strategic objectives that focus on eliminating gender-based violence; ensuring the highest attainable standards of health; promoting equal pay, economic empowerment and work-life balance; improving access to quality care and employment under fair conditions; fostering inclusive education and equal participation in political and economic decision-making; and reinforcing institutional mechanisms that uphold and advance women's rights. Over time, the EU and its Member States have translated the principle of gender equality into an evolving framework of policies, strategies and funding instruments. These commitments are supported and reinforced by international and regional standards, which highlight two fundamental preconditions for effective gender equality policy: (1) the presence of gender equality strategies and plans, and (2) the systematic use of data and indicators.

Gender equality strategies and plans are crucial to the realisation of gender equality mandates. For example, the importance of institutional mechanisms for the realisation of gender equality is emphasised in the [Beijing Platform for Action, adopted at the 1995 World Conference on Women](#)³. In this context, the [Council of Europe's recommendations on gender equality standards and mechanisms](#)⁴ mention gender equality strategies and plans as an important instrument for the institutional anchoring and implementation of gender equality. The [EU Regulation on common provisions for the European Funds](#)⁵ explicitly calls for such a strategic framework for gender equality as a fundamental prerequisite for the European Regional Development Fund (ERDF), the European Social Fund Plus (ESF+) and the Cohesion Fund. Most recently, in 2023, the [Council of the European Union called on Member States to "adopt national targets, policy frameworks or strategies on gender equality, and action plans"](#)⁶.

In parallel, the role of **data and indicators** in gender equality policy has long been emphasised. The [Beijing Platform for Action](#) includes the collection, processing and dissemination of gender-disaggregated data as a separate strategic goal⁷, and the [Council of Europe's recommendations](#)⁸ also underline the importance of data and indicators in the implementation of gender equality policy. Furthermore, [Article 11 of the Istanbul Convention](#) on preventing and combating violence⁹ against women and domestic violence^{viii} focuses explicitly on data collection and research. This is because data and indicators are just as important for the empirical identification and political communication of the need for gender equality policy action as they are for the planning, management and evaluation of gender equality measures and programmes.

This manual contributes to advancing the design of these instruments by offering a structured and practical resource for designing effective gender equality action plans and indicators. Drawing on the experience of the Gender Flagship Project, it links methodological guidance with concrete examples from across the beneficiary authorities supported by the project, with the aim of supporting policy actors in institutionalising gender equality and applying evidence-based tools for the implementation and monitoring of their equality policies through action plans.

1.1 What are gender equality action plans, and what purpose do they serve?

Gender equality action plans serve as operational tools for translating constitutional, legal and strategic commitments to gender equality into action across public administrations at national, regional and local levels. Action plans are usually packages of measures embedded within a strategic framework. When designed and implemented appropriately, they can be a helpful and effective instrument for the systematic planning, coordination, management and evaluation of equality policy measures. A gender equality action plan can serve to design and implement measures in a targeted and effective manner.

A gender equality action plan is an especially effective tool for operationalising gender equality as a cross-cutting policy objective within public administration. Public administrations across Europe are often structured along sectoral or departmental lines, with ministries or departments exercising clearly defined and specialised responsibilities. While such functional specialisation enhances administrative efficiency, it can also reinforce institutional silos. In contrast, gender equality is a cross-cutting policy objective that intersects with multiple sectors, including employment, education, health, justice and finance. As a result, the gender equality mandate cannot be fulfilled by a single authority or within one policy area alone; all ministries or departments are required to integrate a gender perspective into their respective domain. This necessitates effective cross-departmental coordination and governance mechanisms to define shared objectives, align measures, and ensure coherent and sustained implementation, with gender equality action plans being one of the tools to achieve this.

Gender equality action plans are suitable instruments for the cross-departmental coordination of the gender equality mandate. They also offer technical support to individual ministries or departments, through the leadership of the gender equality department.

Various terms are used across countries and institutions to describe plans, programmes, or strategies designed to promote gender equality, such as “gender action plan”, “gender equality action plan”, “gender equality strategy” and “gender mainstreaming plan”. To avoid confusion and to clarify the type of plans referred to in this manual, it is helpful to distinguish between the **three dimensions of gender mainstreaming**: the organisational, the personnel, and the impact dimension¹⁰. The organisational dimension refers to the governmental and administrative structures and mechanisms, i.e. institutional arrangements for establishing gender equality as a cross-sectional task within an institution (e.g. establishment of a gender equality department, its resources and participation rights). The personnel dimension addresses the staff employed in public authorities at national, regional, and local levels. The impact dimension refers to the sectoral implementation of gender equality policies in order to promote gender equality in the policy fields and areas of responsibility of public authorities at national, regional, and local level.

Accordingly, **three types of gender equality plans** can be differentiated from each other: gender mainstreaming institutionalisation plans addressing the organisational dimension (directed inwards), equal opportunities personnel plans addressing the personnel dimension (directed inwards), and gender equality action plans aiming at the impact dimension (directed outwards). In reality, gender action plans are often a mixture of organisational (institutionalisation plan), personnel-related (personnel plan) and sectoral (action plan) approaches.

Gender Mainstreaming institutionalisation plan

Gender mainstreaming institutionalisation plans serve the organisational establishment of gender equality as a cross-sectional task of an administration, i.e. design of suitable organisational structures, processes and tools. This creates the internal conditions for effectively implementing gender equality in the administration's fields of responsibility and areas of activity. This includes, for example, regulation of responsibilities, development of the necessary gender competence of staff in the administration and the introduction and application of suitable tools. The European Institute for Gender Equality, for example, has published a toolkit for the creation of an institutionalisation plan¹¹.

The term **gender equality strategy** is used here as an overarching term for a comprehensive strategy for the implementation of gender equality as a cross-cutting objective. Ideally, a gender equality strategy consists of these three pillars of gender mainstreaming: an institutionalisation plan, an action plan and a personnel plan (see Fig. 1).

Equal opportunities personnel plans

Equal opportunities personnel plans are a tool for promoting equal opportunities among the employees of an administration. This can include topics such as non-discriminatory career paths and work-life balance. Such personnel plans for the advancement of women are drawn up for public employees of federal and state authorities within the framework of federal and state anti-discrimination laws.

Gender equality action plans

Gender equality action plans are directed outwards to the policy fields and areas of activity of national, regional or local public administrations. They are a tool for the systematic coordination, planning and management of the implementation of gender equality policy approaches and measures designed to promote gender equality in the policy fields and areas of responsibility of a federal, state or municipal administration.

A key frame of reference for gender equality action plans, and a central component of a gender equality strategy, are **key gender equality objectives**. These are the overarching equality objectives for gender equality policy. Key gender equality objectives are designed to define in concrete terms what the mandate of gender equality means for the policy and action areas of national, regional or local public authorities.

FIG. 1: THREE TYPES OF GENDER EQUALITY PLANS AS COMPONENTS OF A GENDER EQUALITY STRATEGY



Source : devised by the author.

This manual focuses specifically on gender equality action plans - those directed outwards to the areas of activity and responsibility of public administrations at national, regional and local levels. They enable the systematic planning, coordination and management of gender equality policy approaches and measures across various sectors such as employment, education, health, justice, and finance. Gender equality action plans are designed to promote gender equality in the government's policy areas and the administration's service delivery to the public.



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1.2 What are indicators, and what purpose do they serve?

An indicator is a key figure that indirectly reflects a fact that cannot be represented directly, by recording observable or measurable information that has a verifiable connection to the fact. Indicators are used for the systematic and regular observation of a situation over a period of time, i.e. monitoring.

In politics and administrative work, indicators are used to illustrate social structures and developments in various fields of policy and action. In this context, they are used to highlight social developments and communicate the need for action (e.g. labour market indicators). Indicators are also used for the management and evaluation of measures and programmes, by measuring and reviewing the performance and results of implementation (e.g. ESF monitoring).

In gender equality policy, when mapping social structures and developments, a distinction must be made between sex-disaggregated data, gender statistics and indicators, and gender equality indicators¹².

Gender statistics and gender indicators

Gender statistics and gender indicators are statistics and indicators that are suitable for adequately depicting the differences and inequalities in the situations of women and men. They are based on an understanding of social gender relations. Gender statistics contain sex-disaggregated data on topics relevant to gender equality, as well as the variables required to provide differentiated information on gender relations. Gender indicators are selected key figures that allow a concise illustration of gender relations. They usually consist of a comparison between women and men.

Sex-disaggregated data

Sex-disaggregated data are data that are collected and presented differentiated by sex. These are the basis for gender statistics and gender indicators as well as for equality indicators.

Gender equality indicators

Gender equality indicators are not only used to represent gender relations and compare the situations of women and men; they also have a direct link to a gender equality objective, which can be defined theoretically or politically. A gender equality indicator is therefore a figure that “summarises a large amount of information in a single figure, in such a way as to give an indication of change over time, and in comparison, to a norm”¹³.

Beck, T. (1999). Using Gender-Sensitive Indicators. A Manual for Governments and Other Stakeholders. Commonwealth Secretariat, London.

Other indicators that can be used in gender equality work are **target and implementation indicators**. These help to measure the implementation and results of gender equality policy measures and the achievement of targets, and assist in monitoring them.

This manual deals with gender equality indicators for gender equality objectives (Section 2.2) and indicators for gender equality action plans (Section 5.2).



Section 2



KEY GENDER EQUALITY OBJECTIVES AND INDICATORS

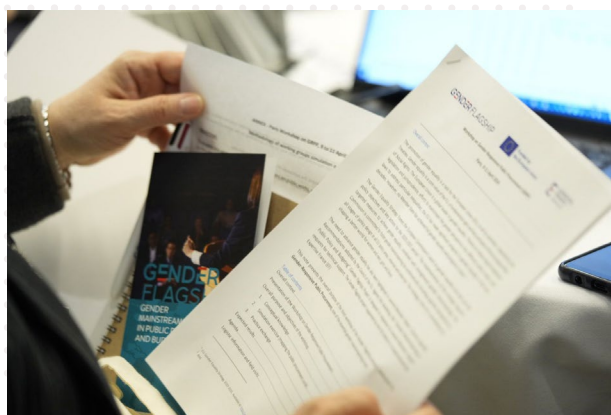
Key gender equality objectives provide a comprehensive frame of reference for equality work at national, regional or local level (Section 2.1). **Gender equality indicators** show the development of the gender equality situation in a country or region in relation to the key objectives of gender equality policy (Section 2.2).

2.1 The purpose of key gender equality objectives

Key gender equality objectives are overarching gender equality objectives that define, in a concrete way, the legal obligations, political priorities and mandates of authorities in relation to equality between women and men, with respect to various aspects of society and policy fields. They form a comprehensive reference framework for gender equality policy and its implementation in practice. To this end, key gender equality objectives should be comprehensive, i.e. they should address all topics and policy fields relevant to gender equality. Thus, they also form the reference framework for a gender equality action plan.

Ideally, key gender equality objectives should incorporate those international and European gender equality standards and objectives to which the country or region has committed itself. Most importantly, these are the [Convention on the Elimination of All Forms of Discrimination against Women](#)¹⁴, the [Beijing Platform for Action](#)¹⁵, the [Istanbul Convention](#)¹⁶ and the [gender equality objectives of the 2030 Agenda](#)¹⁷.

Key gender equality objectives serve as an overarching frame of reference, i.e. they do not relate exclusively to the specific responsibilities and fields of action at various levels of public authorities. To establish the link between these overarching key gender equality objectives and the specific competencies and tasks a public body has to exert influence at national, regional or municipal level, sectoral gender equality objectives, derived from the overarching key objectives, can be formulated in relation to the particular areas of action and tasks of administrative authorities (see Section 4.1).



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2.2 *Developing gender equality indicators*

Gender equality indicators serve to reflect the gender equality situation in a country or region in relation to key gender equality objectives and to monitor its development over time.

They are intended to provide an overview of the overall situation and are therefore not limited to the specific competencies and scope for action of national, regional or local public authorities.

2.2.1 REQUIREMENTS FOR GENDER EQUALITY INDICATORS

Good gender equality indicators should be meaningful, comprehensive, comprehensible and institutionalised:

- Gender equality indicators are **meaningful** if they relate directly to a key gender equality objective and reflect it as accurately as possible.
- Gender equality indicators should be **comprehensive**, i.e. as far as possible, they should cover all gender equality objectives (and their various dimensions). They should also remain manageable, i.e. forming a series of key indicators.
- Good gender equality indicators are **comprehensible**, i.e. attention should be paid to minimising the risk that they are misunderstood or misinterpreted.
- To successfully fulfil their purpose, gender equality indicators must be **institutionalised**. In other words, it should be ensured that they are regularly updated, published and utilised.

Various sets of key gender indicators exist at international, European and national levels. Examples include the OECD Dashboard on Gender Gaps¹⁸ and the indicators of the EIGE Gender Equality Index¹⁹. When selecting gender equality indicators, it makes sense to draw on such existing sets of indicators, or on frequently used gender indicators. The use of existing or regularly published indicators reduces the effort required not only to develop the gender equality indicators, but also in the ongoing updating of indicator values. It also provides the opportunity to compare the national or regional situation with other EU Member States.

It should be noted, however, that the first quality criterion for gender equality indicators – their informative value in relation to national or regional key gender equality objectives – cannot always be met by using existing indicators. Researching existing indicators should be a starting point, but must be accompanied by a review of their meaningfulness and comprehensibility in relation to the key gender equality objectives they are intended to reflect.

The key gender equality objectives, rather than the availability of indicators and data, should be the starting point for the development and selection of good – i.e. meaningful, comprehensible and comprehensive – gender equality indicators.

2.2.2 STEPS FOR DEVELOPING GENDER EQUALITY INDICATORS

The procedure for developing indicators comprises the following steps

1. Describing and operationalising the gender equality objectives ;
2. Researching and reviewing existing gender indicators ;
3. Developing indicator proposals ;
4. Choosing suitable indicators on the basis of predefined selection criteria;
and
5. Institutionalising the selected gender equality indicators.

The first step in developing and selecting gender equality indicators is to **describe and operationalise the key gender equality objectives** they are intended to reflect: What are the relevant dimensions and factors of a given gender equality objective ? Which observable facts can be used to measure them ?

The second step is to **research and examine** whether existing gender indicators are meaningful enough to be used in mapping the specific gender equality objectives, or what data sources are available for the development of meaningful gender equality indicators. A distinction must be made between availability in the sense of being in existence, and availability in the sense of being accessible. The question is often not whether the required data are available at all, but whether they can be accessed and at what cost. This includes issues such as whether (and to what extent) they are published regularly, and how they can be obtained.

For those gender equality objectives for which sufficiently meaningful indicators are not (or are only partially) available, the third step is to **develop indicator proposals**. This involves identifying a suitable data source, researching a benchmark (or defining one if it is not available) and creating a formula for calculating the indicator. A benchmark can be a comparative or a target value. It can be defined, for example, as a comparison with the EU or national average (reference level), a comparison between women and men (parity), or as a regulatory or politically defined target value.

Gender equality indicators can be finalised on the basis of **selection criteria** that should be defined in advance. The desired number of indicators (for each gender equality objective, and for the total number of indicators) should also be considered in advance and a balance struck between manageability and information density.

After gender equality indicators have been defined, their **institutionalisation** should be ensured. This involves ensuring they are regularly updated and used in practice. To achieve this, it is helpful to create instructions, e.g. in the form of an indicator manual. This should include information on the data sources used and the procedure for updating. A description of each indicator with an explanation of how to interpret it (e.g. detailing the possible limitations of its informative value) should also be included. Agreements should be reached as to who is responsible for maintaining the indicators (including their regular updating, publication and utilisation).

Illustrative example: Developing gender equality indicators – Saxony-Anhalt

Saxony-Anhalt, with support from the EU-funded Gender Flagship Project, developed a comprehensive system of indicators that aligned with its constitutional mandate for gender equality (Art. 34). The State Programme for a Gender-Just Saxony-Anhalt defined eight key gender equality objectives to define Saxony-Anhalt's constitutional mandate for gender equality (Art. 34), such as economic independence, shared responsibility for care work, the prevention of violence, and equal political participation. With the support of the Gender Flagship Project, a comprehensive system of gender equality indicators was developed to monitor each of these key gender equality objectives.

Each gender equality indicator was developed and selected in accordance with the following priorities:

1. Relevance to Saxony-Anhalt's key gender equality objectives,

2. Need for action in Saxony-Anhalt,

3. Comprehensibility, and

4. Feasibility (resources required for data collection, calculation and regular updating)

The gender equality indicators were coordinated with all ministries and presented in a guide using a standardised format, including a definition, data source, procedure for updating, and explanations regarding interpretation and possible limitations. Supplementary key figures provided additional analytical depth.

The above example demonstrates how indicator frameworks can be tailored to regional policy contexts, while remaining methodologically rigorous and practically implementable.

For a more detailed description, please see the Annex, Case Study 4: Saxony-Anhalt's approach to gender equality indicators.

Source: Analysis of "Gender Equality Indicators for the State Programme for a Gender Equal Saxony-Anhalt", Gender Flagship Project.



Section 3



STANDARDS OF EFFECTIVE GENDER EQUALITY ACTION PLANS

A **gender equality action plan** that meets the standards for effectiveness provides significant value for a successful gender equality policy (see Section 3.1). Several key elements can enhance the effectiveness of a cross-departmental action plan (see Section 3.2).

3.1 *Quality criteria for gender equality action plans*

A gender equality action plan is best able to fulfil its purpose if it is designed to be institutionalised, participatory, impact oriented and verifiable:

- **Institutionalised** means that a gender equality action plan is based on a binding mandate or a binding decision, and that all relevant ministries and departments are involved and participate in its design and implementation. For federal and state action plans, inter-ministerial coordination structures are especially important – as highlighted, for example, in the Council of Europe’s recommendations on equality standards and mechanisms²⁰, and reaffirmed recently in the Conclusions of the Council of the European Union²¹.
- **Participatory** means that stakeholders, and civil society in particular, are involved in the creation, coordination and monitoring of a gender equality action plan – as recommended in the recommendations of the Council of Europe and the Conclusions of the Council of the European Union. The accompanying involvement of experts in science and research can also be advantageous.
- **Impact-oriented** means that a gender equality action plan and its measures are designed to contribute towards the overarching key objectives and to achieve demonstrable impacts. To this end, the objectives to be achieved should be defined in concrete terms, and the measures planned and described in such a way that their expected contribution to these objectives is plausible and easily understood.
- **Verifiable** means that the services provided by the measures and the results achieved by them are defined and recorded in such a way that their scope, the status and quality of implementation and the degree to which they achieve their target(s) can, as far as possible, be quantitatively measured and/or qualitatively mapped.

An institutionalised, participatory, impact-oriented and verifiable gender equality action plan offers high added value for the promotion of gender equality. Such an action plan contributes significantly to participation, commitment, transparency and effectiveness of gender equality policy (see Fig. 2).

FIG. 2: ADDED VALUE OF INSTITUTIONALISED, PARTICIPATORY, IMPACT-ORIENTED AND VERIFIABLE ACTION PLANS

Gender equality action plans



3.2 Core elements of effective gender equality action plans

To be implemented successfully, a gender equality action plan must fulfil its coordinating and steering functions in the best possible way. The prerequisite for this is that the action plan is institutionalised. The central elements of the institutionalisation of an action plan are that it is based on a binding mandate or binding **resolution** (parliamentary or cabinet resolution); that there are **coordination structures** into which all of the ministries or departments involved are integrated (interministerial working group); and that there is a responsible body that assumes **leadership** and provides specialist support (gender equality department).

To ensure that the planning and coordination processes are participatory, the involvement of stakeholders, civil society in particular, should also take place in an institutionalised form. A **participation structure** such as an advisory board can be set up for this purpose.

Illustrative example: Participatory planning and implementation arrangements – Romania

Romania's National Plan for Women's Economic and Political Empowerment, supported by the EU-funded Gender Flagship Project, exemplifies a structured participatory approach to action plan design and implementation. The National Agency for Equal Opportunities Between Women and Men (ANES) and the country expert for the Gender Flagship Project coordinated broad stakeholder consultations that involved government ministries, civil society, academia, trade unions, political parties and regional agencies. This process ensured the inclusion of diverse perspectives, and built broad ownership of the National Plan.

A two-tier governance mechanism was suggested for the implementation of the Plan. This comprised a Steering Committee for strategic oversight and a Technical Committee for expert input. In addition, a Monitoring Task Force was proposed to ensure that monitoring was also participatory, incorporating civil society, academic institutions and social partners.

For a more detailed description, please see the Annex, Case Study 1: Romania's Participatory Approach to Gender Equality Planning and implementation.

Source: Analysis of the contents of National Plan for Women's Economic and Political Empowerment, Gender Flagship Project.

In order to be effective, it is also essential that a gender equality action plan is designed to be **impact-oriented** and **verifiable**. A number of elements of the action plan contribute significantly to this:

- As part of the **problem analysis**, the current situation is analysed with regard to all key gender equality objectives and in all equality-relevant areas, in order to identify the need for action. To identify suitable approaches of action, it is also important to describe the causes and influencing factors.
- A **structured set of objectives** forms the strategic framework for a gender equality action plan. It also serves to provide a plausible link between the overarching objectives of a gender equality strategy and the individual measures of the action plan. This enables the action plan to be designed in a way that is impact oriented. To this end, the first step is to derive, from the key gender equality objectives, a set of sectoral objectives that relate to the particular administration's fields of action. These are, in turn, used to determine the targets of the individual measures within the action plan (see Section 4.1).
- **Priorities** for an action plan can be selected and justified on the basis of the problem analysis and the structured set of objectives of the action plan. Within the framework of an action plan, priorities can be set in relation to certain topics or fields of action or to address certain target groups. This enables resources to be assigned to those areas with the greatest need for action, or attention to be focused on certain topics. It is important to justify priorities and to ensure that all areas that are identified as needing action are either addressed by the action plan itself, or that the framework for otherwise addressing them is stated.
- A **measure** is a planned action for which resources (input) are used to provide services (output) and achieve results (outcome), and thus achieve an effect (impact). To design an action plan and its measures in an impact-oriented manner, it is helpful to plan and describe these measures in the form of a so-called "logic model" (see Section 4.2).



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- **Indicators** are a key instrument for systematically reporting and monitoring the success of measures and action plans. They are used to monitor and review progress, results and the achievement of objectives, both of the measures with an action plan, and of the action plan as a whole. They do so by providing specific information both quantitative and/or qualitative – at all stages of the action plan’s implementation (see Section 5.2).

- **Resources** are the financial and human resources used to implement an action plan and achieve its objectives. A precise statement of the planned resources is helpful in order to ensure a realistic relationship between the resources used on the one hand, and expectations with regard to performance, results and impact on the other. This not only enables the right resources to be secured, but also – importantly – provides transparency regarding the scope of the resources used, and also enables implementation to be monitored on the basis of how (and how much) resources have been used.

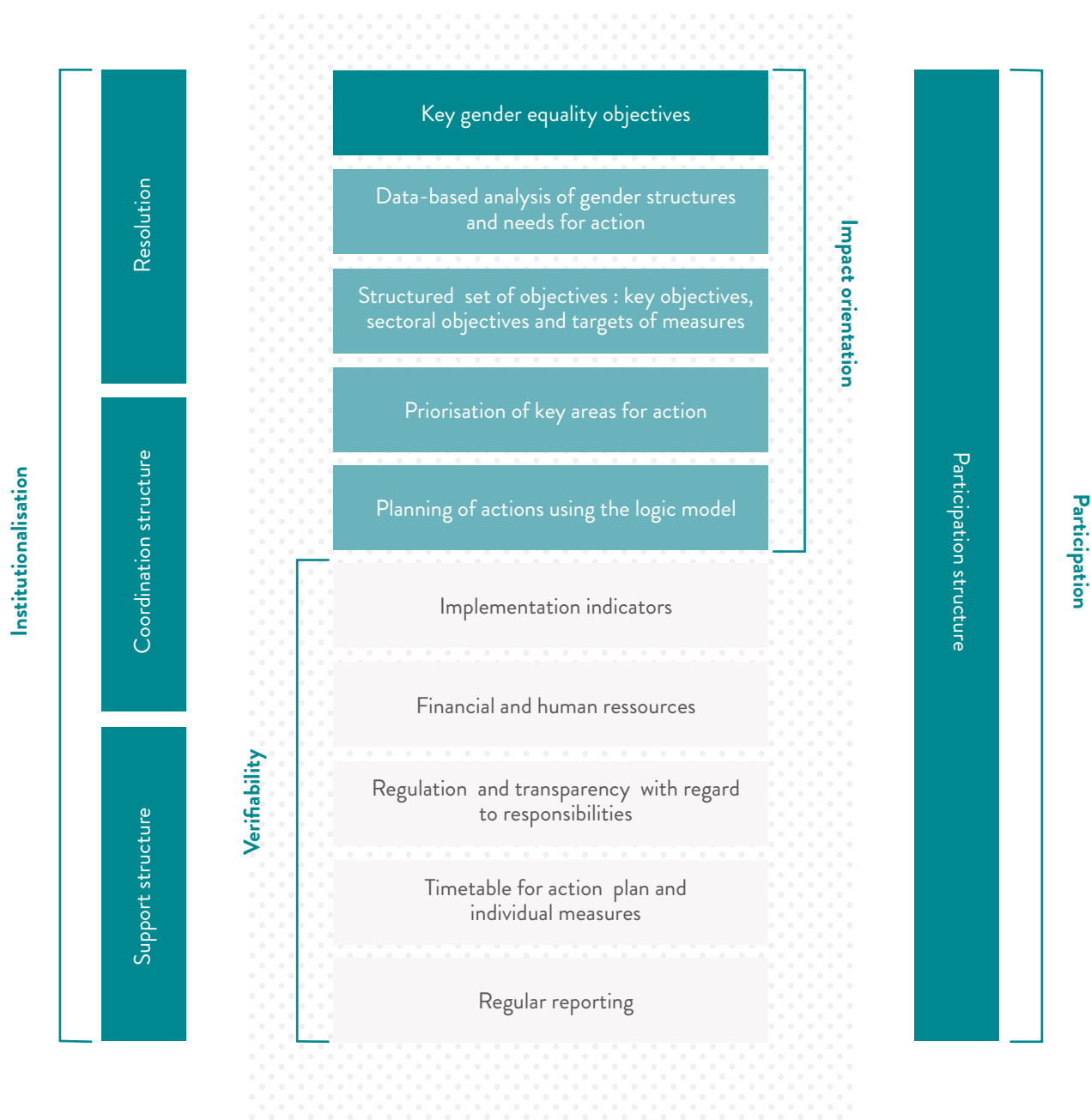
- Precisely describing and regulating the **responsibilities** of various actors with regard to individual measures facilitates the process and increases the binding character and verifiability of implementation.

- A **timetable** is also an important element in ensuring commitment and verifiability. This should define both the timescale for the action plan as a whole and the schedule for all individual measures, as well as agreements on deadlines and dates for reporting.

- Lastly, systematic **reporting** strengthens verifiability and transparency, and thus the binding character of an action plan. To this end, reporting should be carried out regularly at fixed points in time, and should reflect the status and results of implementation as well as the degree to which targets have been achieved (see Section 5.1).

FIG. 3: ELEMENTS OF AN EFFECTIVE GENDER EQUALITY ACTION PLAN


Gender equality action plans




Source : devised by the author.



Section 4



DESIGNING IMPACT-ORIENTED GENDER EQUALITY ACTION PLANS



An impact-oriented action plan is designed to make a contribution to the overarching key objectives – in other words, to achieve certain demonstrable impacts. To this end, the strategic and operational objectives to be achieved should be specifically defined and presented in the form of a **structured set of objectives** (see Section 4.1). The measures within the action plan should be planned and described in such a way that their expected contribution to these objectives – i.e. the underlying impact logic – is plausible and easily understood. A common way to present the impact logic of an action plan is in the form of a so-called logic model (for more on this, see Section 4.2). The structured objectives and a **logic model** combine to form the **impact model** for an impact-oriented gender equality action plan (see Section 4.3).

4.1 *Defining a structured set of objectives*

The gender equality situation in a given country or region is influenced by a variety of factors. Some factors for improving equality can be directly shaped by policy; others lie, for example, within the area of social norms, which can at best be influenced only indirectly by politics. The possibilities for political intervention are also largely determined by the various competencies and opportunities to exert influence that exist at national, regional or local level.

A structured set of objectives serves to establish the connection between overarching objectives on the one hand, and the practical options for action and influence on the other. It forms the strategic framework for an action plan and is the cornerstone for impact-oriented planning.

Key gender equality objectives define in concrete terms the mandate for equality between women and men in various areas of society and policy fields. To determine the structured objectives of a gender equality action plan, it is necessary to derive, from these overarching gender equality objectives, specific gender equality objectives that apply to the respective fields of action of the ministries or departments concerned. The targets for the individual measures within a gender equality action plan can, in turn, be derived from these specific objectives tailored to the respective policy fields and areas of responsibility:

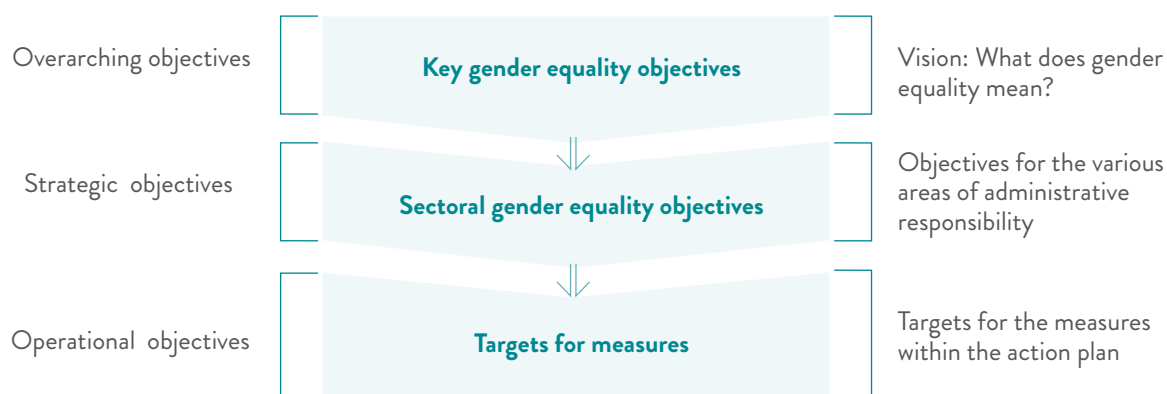
- **Key gender equality objectives** make concrete the constitutional mandate, and serve as the overarching frame of reference for what equality means. Ideally, these should refer to those international and European gender equality standards and objectives to which the specific country has committed itself. Key gender equality objectives should be comprehensive, i.e. they should address all topics and policy areas relevant to gender equality (see Section 2.1).

- **Sectoral gender equality objectives** are the strategic gender equality objectives of the individual ministries or departments concerned. These establish the connection between the key gender equality objectives and the specific competencies to influence the various policy areas at national, regional or municipal level. Sectoral objectives should be relevant to action, i.e. they should be concretely related to the specific responsibilities, areas of competence and scope for action of the ministries or departments concerned. They should also be binding, i.e. subject to review and reporting.

- **Targets for individual measures** form the operational objectives of a gender equality action plan. These should not refer to the specific activities planned (i.e. what is to be implemented), but to the expected results (i.e. what is to be achieved) of the action plan. Targets for measures should be derived from the sectoral gender equality objectives, and should be realisable and verifiable as part of the action plan's implementation.

FIG. 4: STRUCTURED SET OF GENDER EQUALITY OBJECTIVES FOR AN ACTION PLAN

Structured set of gender equality objectives



Source: devised by the author.

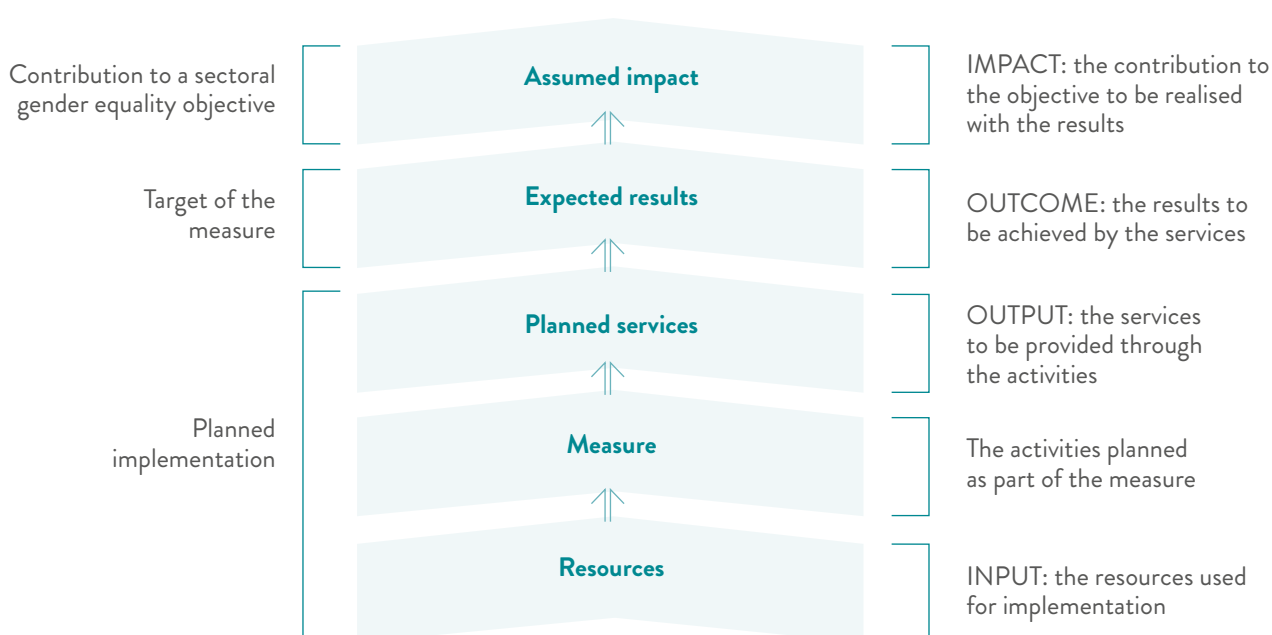
The structured gender equality objectives of a gender equality action plan can also serve as a **reference framework for the implementation of gender budgeting**. They can be used to examine and describe whether various budget items have gender equality-relevant impacts, and what these are. As part of impact-oriented budget planning, the structured objectives can be used directly to define and operationalise gender equality objectives.

4.2 Using a logic model to plan and connect actions to impacts

An action plan and the measures it contains are based – implicitly or explicitly – on certain impact assumptions. These are assumptions that certain activities will have certain impacts, and will thus contribute to certain objectives.

With the help of a so-called “logic model”²² (see Fig. 5), these underlying impact assumptions can be presented in a plausible and easy-to-understand manner. A logic model schematically depicts the relationship between the resources used, the planned services, the expected results and the assumed impacts – thereby illustrating the expected impact of an action plan or measure. A logic model can be used for an individual project or measure or for an entire action plan.

FIG. 5: LOGIC MODEL FOR THE MEASURES IN A GENDER EQUALITY ACTION PLAN



Source: author's own illustration, based on W.K. Kellogg Foundation (2004)²³

The planning of measures in the form of a logic model enables their expected contribution to the objectives of an action plan to be presented in a plausible and (as far as possible) verifiable manner. Such planning also helps to create realistic expectations – i.e. to project results that are achievable – and is therefore a cornerstone for the successful achievement of an action plan's objectives.

Illustrative example: Intervention logic – Romania

Romania's National Plan for Women's Economic and Political Empowerment, supported by the EU-funded Gender Flagship Project, presents a clear intervention logic that links strategic objectives to concrete measures. At its core is an explicit theory of change, which outlines the preconditions necessary for increasing women's participation in economic and political life. These include more gender-responsive employment policies, improved care infrastructure, and action against gender-based violence.

The content of the plan is structured as follows:

- Four interlinked priority directions: labour market policies, work-life balance, participation in decision-making, and violence decrease;
- A hierarchy of objectives, from one overarching goal to six specific objectives; and

- More than 50 concrete measures, each linked to inputs, outputs, outcomes and indicators that comprise baselines, targets and sources for verification.

Monitoring and evaluation are embedded into the logic model, with dedicated governance bodies and a Monitoring Task Force, as well as periodic reporting and evaluation requirements.

This case demonstrates how a structured intervention logic can effectively connect high-level policy ambitions with measurable, actionable outcomes.

For a more detailed description, please see the Annex, Case Study 2: Intervention logic for Romania's National Plan for Women's Economic and Political Empowerment.

Source: Analysis of the contents of National Plan for Women's Economic and Political Empowerment, Gender Flagship Project.

In a logic model, the input (the resources used), output (the services planned with a measure), outcome (the expected results) and impact (the assumed impact) are mapped schematically (see Fig. 5). For each case, the results and impacts that can actually be influenced by the measures are presented.

The difference between the outcome and the impact is often determined by the timescale (medium-term/long-term effect) or the strength of the assumed cause-and-effect relationship (direct/indirect effect). A distinction can also be made according to the level of the assumed impact²⁴. For example, an outcome may refer to the target group of measures (changes in individuals' abilities, behaviour and living conditions), while an impact may relate the effect at a societal level (desired social, economic, etc. changes in society or a specific region).

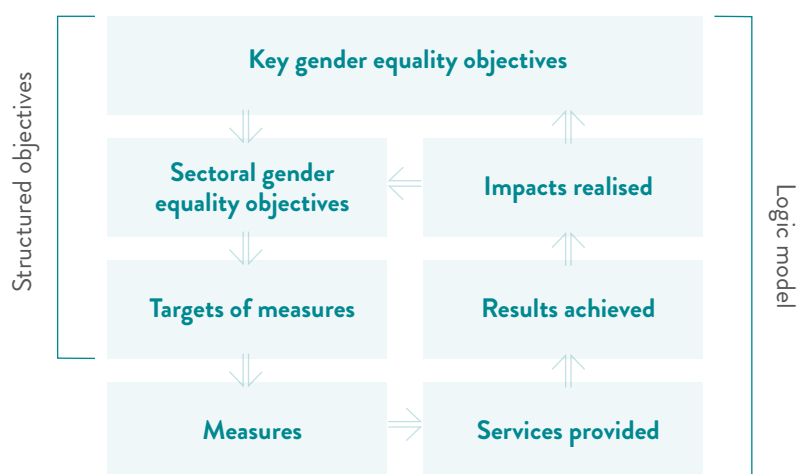
Ideally, a logic model and its subdivisions should relate to or be derived from a structured set of objectives (see Section 4.1). Together, they form the impact model of an impact-oriented gender equality action plan (see fig. 6).

4.3 Building an integrated impact model

An effective gender equality action plan should be based on a structured set of objectives that derives from one another the action plan's overarching key objectives, the sectoral objectives of the ministries or departments concerned, and the target of the chosen measures. In addition, it should be based on planning in the form of a logic model that link, in a plausible and verifiable manner, the expected contribution(s) of the measures to the desired objectives. Together, structured objectives and a logic model form the impact model for an effective gender equality action plan (see Fig. 6).

FIG. 6: IMPACT MODEL FOR A GENDER EQUALITY ACTION PLAN

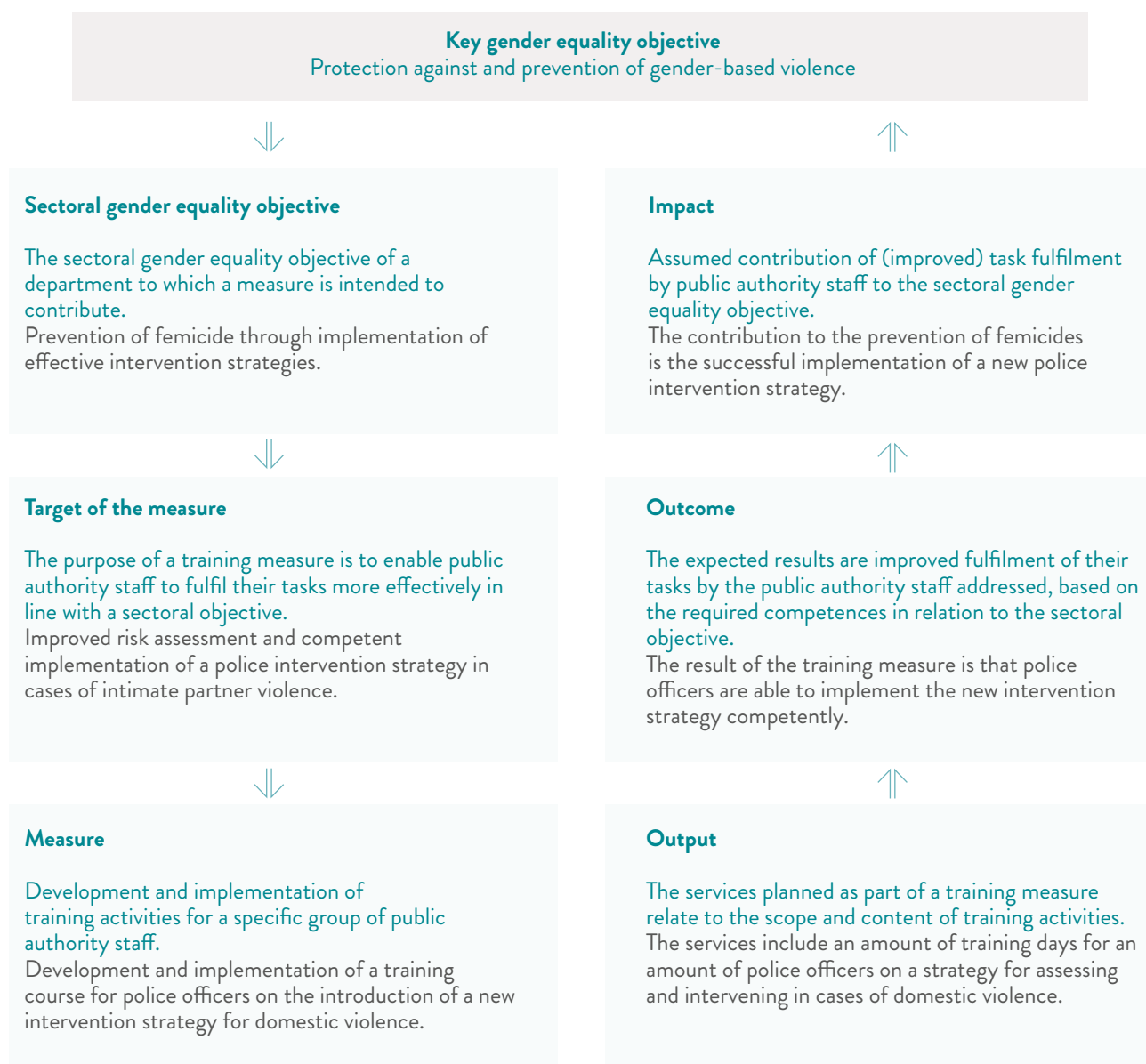
Impact model



Source: devised by the author.

EXAMPLE: TRAINING OF POLICE OFFICERS

(type of measure: competence development of public authority staff)



Source: devised by the author.



Section 5



MAKING GENDER EQUALITY ACTION PLANS MEASURABLE AND ACCOUNTABLE



Designing of an action plan that is verifiable contributes significantly to both transparency and commitment, and thus to the successful implementation of the action plan and its measures. In this context, “verifiable” means that the services provided under the various measures proposed, and the results achieved by these services, are defined in advance. These services are then reported on regularly to ensure that their scope, the status and quality of implementation and the degree to which their targets are achieved can be mapped and tracked.

Systematic **reporting** strengthens the verifiability and thus the transparency and binding character of an action plan (see Section 5.1). A key element in this is the **indicators** of the action plan (See Section 5.2).

5.1 *Setting up a robust reporting system*

Systematic reporting shows the status, scope and quality of an action plan’s implementation and results, as well as the degree to which its objectives are achieved. This serves not only auditing purposes and accountability obligations, but also the management of ongoing implementation – particularly in the case of long-term action plans. Importantly, it also forms the basis for planning a follow-up intervention. Reporting should therefore be informative, comprehensible and verifiable. Good reporting is complete, clear, substantiated, regular, institutionalised and transparent:

- Good reporting is **complete**. In other words, it should contain information on the resources planned and deployed, the services planned and implemented, and the results expected and achieved. It should also catalogue any deviations from the plan and the reasons for these, as well as any changes to the planned measures and the reasons for these. It should also report on the outlook for further steps in the implementation of all measures included in the action plan.
- Good reporting is also **clear**, i.e. essential information should be presented concisely, in a well-structured and standardised manner. To ensure reporting is user-friendly, floods of information or so-called “data cemeteries” should be avoided.
- Reporting should be **substantiated**, i.e. the presentation should be made in a way that is verifiable and supported by evidence.
- Good reporting takes place **regularly** at fixed points in time that enable it to fulfil the intended purposes (the management of a current action plan; the planning of a follow-up action plan).
- Reporting should be **institutionalised**. This means that the responsibilities for reporting are defined, as well as its schedule, procedure and the use that is made of the reporting.

- Lastly, good reporting is **transparent**, i.e. it should be made available to everyone and published promptly.

Planning and describing the measures in a gender equality action plan in the form of a logic model (see Section 4.2) is a helpful basis for informative, comprehensible and verifiable reporting.

If, as part of the reporting on a gender equality action plan, information on the resources used is combined with information on the corresponding functions from financial statistics (based on the classification of government functions (COFOG) within the framework of the European System of Accounts (ESA 2010)), this can also be used for tracking or tagging (e.g. using OECD DAC markers) within the framework of **gender budgeting**.

Illustrative example: Reporting module – Saxony-Anhalt

As part of the EU-funded Gender Flagship Project, a “Reporting module” consisting of three templates was developed as the basis for reporting on the State Programme for a Gender-Just Saxony-Anhalt.

1. Description of measures

The purpose of the template was to prepare for the resolution on measures for the gender equality action plan at the political decision-making stage. With the help of this template, the proposed measures were described, as far as possible, in terms of a logic model.

2.a Documentation form

The documentation form is used for in-depth technical design and structuring in the sense of a logic model, and to prepare the reporting. Following on from (1), description of measures, the adopted measures are presented in an impact-oriented manner and indicators are added.

2.b Accompanying explanation of the Documentation form

The supplementary explanatory notes provide information and examples to support an impact-oriented description of the measures and the definition of output and outcome indicators.

3. Report form

Lastly, the report form is used to provide, in a structured form based on (2.a), the documentation form, all the information on implementation and results for each measure necessary for reporting on the overall action plan.

For a more detailed description, please see the Annex, Case Study 5: Establishing coordination mechanisms for gender-responsive policies in Saxony-Anhalt.

Source: Analysis of “Equality Indicators for the State Programme for a Gender Equal Saxony-Anhalt”, Gender Flagship Project.

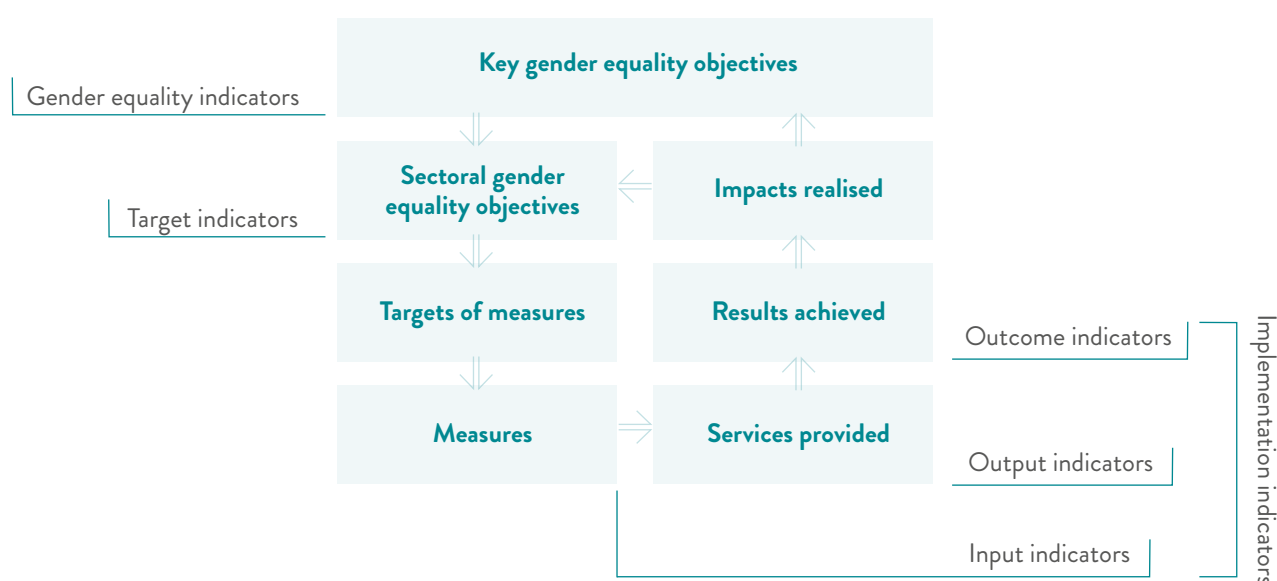
5.2 *Selecting and using indicators for monitoring and evaluation*

Indicators are an essential part of the design of a verifiable gender equality action plan as well as a tool for systematic reporting. The indicators for an impact-oriented and verifiable action plan may consist of various types of indicators – gender equality indicators, as well as target and implementation indicators. Each of these serves a different purpose.

Gender equality indicators refer to the overarching key objectives that serve as the frame of reference for a gender equality action plan. They reflect the status and development of the gender equality situation on which the action plan is intended to have an impact (see Section 2.2). In line with the structured objectives of the action plan, target indicators can be defined for the sectoral gender equality objectives of the ministries or departments concerned (see Section 4.1). These target indicators are superordinate to the action plan, or are formulated as part of it. Lastly, implementation indicators are indicators that relate directly to the measures within an action plan (see Fig. 7).

FIG. 7: INDICATORS FOR AN ACTION PLAN

Indicators for a gender equality action plan



Source: devised by the author.

5.2.1. TARGET INDICATORS

In principle, target indicators are those indicators that measure the status and achievement of a particular objective.

In the context of this manual, target indicators are specifically understood as those indicators that serve to measure sectoral gender equality objectives. Sectoral objectives establish a connection between the key gender equality objectives and the specific competencies and scope for political influence of administrations at national, regional or municipal levels (see Section 4.1). Sectoral gender equality objectives should be both action-relevant and binding. In this sense, the way in which target indicators are defined helps in formulating sectoral objectives that are SMART (specific, measurable, appropriate, relevant and time-bound).

SMART sectoral gender equality objectives

S for specific: Sectoral objectives should be formulated specifically to ensure that they are concrete and unambiguous.

M for measurable: Sectoral objectives should be measurable, so that it is possible to check the extent to which they are achieved.

A for appropriate: Sectoral objectives should be appropriate to the specific competencies of the actors they address and their opportunities to influence, i.e. they should be both ambitious and achievable.

R for relevant: Sectoral objectives should respond to a relevant need for action, and the achievement of these objectives should mean a relevant improvement in the situation.

T for time-bound: Sectoral objectives should be time-bound, i.e. the achievement of these objectives should relate to a specific time period.

Formulating sectoral gender equality objectives that are as specific — i.e. as concrete and unambiguous — as possible, is an essential basis for defining corresponding target indicators. Target indicators are used to make sectoral objectives measurable. Thus, they are a means to enhance both the verifiability and the binding character of gender equality objectives.

A target indicator not only defines what an objective is measured against; it is also linked to a marker (quantified as far as possible) for measuring the extent to which the objective has been achieved. Such a marker can be a baseline value or a target value. A baseline value is used as a marker to check whether (or to what extent) a targeted change has been achieved, compared with the initial state (i.e. an increase or decrease). A target value is used as a marker to measure whether, or to what extent, a defined target state has been achieved.

Example: for the sectoral gender equality objective “Equal participation of women and men in decision-making positions in the state administration”, the target indicator can be defined as the proportion of women in departmental management positions within state authorities. A target value (e.g. women holding a 50 % share of positions) or a baseline value (the share of positions held by women at a certain point in time) can be defined as a marker. A baseline value, used as a marker, can also be linked to a quantified target value – for example, specifying the minimum number of percentage points by which the initial value should increase (or decrease) within a defined period.

5.2.2. IMPLEMENTATION INDICATORS FOR THE ACTION PLAN

Implementation indicators are used to systematically and regularly monitor progress in the implementation and results achieved by an action plan’s measures over a certain period of time, i.e. action plan monitoring. Action plan monitoring forms the basis for both managing an action plan and for reporting on it.

To enable action plan monitoring, corresponding indicators are defined with respect to those steps in the action plan’s logic model for which operationalisation is possible and sensible. These are usually input, output and outcome indicators (see Fig. 7). As far as possible, implementation indicators should provide quantitative (countable), or otherwise qualitative (descriptive) information about the resources used (input), the services provided (output) and the results achieved (outcome).

To monitor an action plan effectively, indicators should be meaningful, complete, uniform, up-to-date, efficient, transparent and applied:

- **Meaningful** implementation indicators are based on an impact model that schematically depicts the resources used, the measures planned and the expected outputs, results and impacts, and places all of these into a comprehensible context in a structured manner (see Section 4.2).
- Monitoring should be **complete**, covering all activities and measures planned as part of the action plan, and all measures should be underpinned by indicators.
- Action plan monitoring should define indicators that are as **uniform** as possible for the planned activities and measures, so that cumulative statements can be made for an action plan, i.e., above the level of single measures. Also, this should enable comparisons to be made over time.
- Action plan monitoring can fulfil its purpose if it is kept as **up-to-date** as possible throughout the entire duration of the action plan. To this end, time intervals must be defined for regular updating, and responsibilities for updating must be assigned.

- **Efficient** action plan monitoring should fulfil its purpose with reasonable effort. The question of efficiency arises, for example, in the selection of indicators (number of indicators, effort required for data collection). Efficiency can be improved, for example, by standardising the collection of information (e.g. through project questionnaires).
- Action plan monitoring is **transparent** if it results in clear and comprehensible reporting (see Section 5.1).
- Action plan monitoring is especially effective if it is not only used for reporting in the narrow sense, but is also **applied**. This means that it serves as an occasion and a basis for a regular exchange between the actors involved regarding the status of implementation, any successes achieved and barriers encountered, as well as any adjustments or alternative courses of action needed. It is important that the implementation indicators are understood by everyone and are accepted by those involved.

Illustrative example: Checklist and guidelines for developing gender equality objectives and target indicators – Hamburg

As part of the EU-funded Gender Flagship Project, the City of Hamburg developed an integrated toolkit consisting of a detailed checklist and accompanying guidelines to support municipal departments in systematically defining and reviewing gender equality targets and indicators.

The checklist, designed explicitly for administrative practitioners, provides a clear, structured approach to embedding gender equality into public services. The guidelines complement this checklist by offering step-by-step instructions, practical explanations and illustrative examples for each stage, ensuring consistent and robust application.

The toolkit is structured around six clear steps:

1. Carry out a preliminary examination for gender equality relevance.
2. Undertake an equality audit: Conduct a detailed analysis identifying gender-specific impacts, clearly defining the service's purpose and the targeted groups.
3. Formulate objectives and measures: develop specific gender equality objectives, linking these directly to political mandates and creating suitable measures to achieve them.

4. Develop and evaluate target indicators: establish measurable indicators to monitor progress, evaluate outcomes and refine measures accordingly.

5. Equality-oriented budgeting: transparently allocate and track budgetary resources that are dedicated to gender equality objectives.

6. Integrate into Policy Frameworks: systematically incorporate the objectives identified, and the measures and indicators defined into Hamburg's Gender Equality Policy Framework (GPR), Gender-Responsive Budgeting (GWHS) and the Gender Equality Monitor.

This structured toolkit facilitates precise planning, execution, monitoring and continuous refinement of gender equality initiatives across Hamburg's municipal governance.

For a more detailed description, please see the Annex, Case Study 3: Hamburg's process for gender equality assessment and target development

Source: Analysis of the contents of the report "Brief guidelines for the development and review of gender equality targets and indicators. Gender equality relevance check and expected effects on women and men and their life situation" and the "Checklist for the development and review of gender equality objectives and key figures", Gender Flagship Project.

When developing implementation indicators for monitoring and reporting on a gender equality action plan, indicators should be defined for each measure. These should relate to the resources used (input), the services planned (output) and the results expected (outcome). A description of the measures in the form of a logic model (see Section 4.2) is a helpful basis for this.

EXAMPLE: TRAINING OF POLICE OFFICERS

(type of measure: competence development of actors)

Gender equality indicator
Femicides per 100,000 inhabitants

Target indicator
Reduction in the number of fatal incidents of intimate partner violence with prior police contact. (Baseline: average for the last 5 years.)



Source: devised by the author.

To ensure that the monitoring of an action plan is as uniform as possible, and is meaningful beyond the scope of individual measures, attention should – as far as possible – be paid to standardising indicators across all measures. To this end, measures can be categorised (e.g. training measures, information measures, business support, etc.) in order to predefine uniform indicators for each type of measure, which are then assigned to the planned measures.

Example: ESF monitoring is a highly standardised monitoring system, consisting of an overarching set of indicators for all ESF-funded measures. An ESF programme usually consists of a large number of projects. This means that it would not be manageable to define indicators separately for individual projects for programme monitoring.

In contrast, the Saxony-Anhalt gender equality action plan, for example, consists of a comparatively small number of measures that are very different in nature. For this reason, it would not have been expedient to pre-define and cluster standardised implementation indicators. With the support of the Gender Flagship Project, a “Reporting module” was therefore developed as a procedure for defining indicators based on measurable information for verifiable reporting. This supported those responsible for the measures in defining indicators for their individual measures, in preparation for reporting.

When defining or assigning implementation indicators, data collection, responsibilities, and timelines must also be clarified. The informative value and timeliness of monitoring must be weighed against the effort required to collect and process the data. The creation of a monitoring plan and a data collection plan can help with this.

A monitoring plan comprises:

- a list and description of the indicators;
- the allocation of indicators to measures (with planned values, where applicable);
- a data collection plan;
- a monitoring table or information on the database to be used for regularly recording the indicator values; and
- a timetable and the clarification of who is responsible for data delivery, evaluation and reporting.

A data collection plan will enable the procedure for the collection and provision of data for the indicators and for monitoring purposes to be clarified with regard to the available data sources, data collection instruments, timing and intervals of data collection, the responsibilities for data collection, as well as the responsibilities and a schedule for entering the data into a monitoring table or database.


Example: data collection plan for monitoring an action plan

What	Questions	Examples
Available data sources	<ul style="list-style-type: none"> • What data are already available, and in what form? (e.g. In paper form or electronically? As individual sheets, or in lists?) • Do the data sources contain all of the information required for the indicator? (e.g. disaggregated by sex, employment status, etc.) • How complete, reliable and up to date are the data? 	<i>Registration forms, project documentation (e.g. reports), audit notes, attendance lists, confirmations of participation or similar.</i>
Data collection instruments	<ul style="list-style-type: none"> • How can data that are not (completely) available be collected? 	<i>Participation questionnaires, project surveys or similar.</i>
Timing and intervals for data collection	<ul style="list-style-type: none"> • What data should be collected, at what times and at what intervals? 	<i>At the start of the measure, at certain points in time, after the end of the measure.</i>
Responsibilities for data collection	<ul style="list-style-type: none"> • Who is responsible for data collection? • Who carries out the data collection? • Who collects, checks and processes the data, and in what form? 	<i>Sectoral department, project management organisation, funding agency, audit authority or similar.</i>
Responsibility and schedule for feeding data into the monitoring system	<ul style="list-style-type: none"> • Who enters the data into the monitoring table or database? • At what times and at what intervals are data to be entered? 	<i>A central office, or different actors responsible for different measure areas.</i>




Source: devised by the author, based on Kurz & Kubek (2013).



Section 6



ANNEX: CASE STUDIES – EXAMPLES FROM INITIATIVES SUPPORTED BY THE GENDER FLAGSHIP PROJECT



6.1 Examples from the support delivered by the Gender Flagship Project to Romania

CASE STUDY 1: ROMANIA'S PARTICIPATORY APPROACH TO GENDER EQUALITY PLANNING AND IMPLEMENTATION

Introduction

Romania's National Plan for Women's Economic and Political Empowerment, supported by the EU-funded Gender Flagship Project, demonstrates an exemplary participatory approach to developing and implementing gender equality action plans. This case study highlights how Romania embedded stakeholder participation throughout the planning process, creating a more inclusive and effective strategy.

Comprehensive stakeholder identification and consultation

From the outset, Romania recognised that successful gender equality initiatives require broad-based participation. The development team for the National Plan worked with the National Agency for Equal Opportunities Between Women and Men (ANES) to identify and consult a diverse range of stakeholders including:

- government ministries (Finance, Education, Labour and Social Solidarity, the Ministry of Family, Youth and Equal Opportunities);
- private sector organisations, with a focus on women's organisations;
- trade unions representing workers' perspectives;
- civil society organisations advocating for gender equality;
- political parties from across the political spectrum;
- academic institutions providing research-based insights; and
- regional development agencies (ROREG), to ensure geographical inclusivity.

This multi-stakeholder approach ensured that the National Plan addressed varied perspectives and needs while building ownership across sectors. The consultations helped to identify the most pressing challenges faced by women in Romania's economic and political spheres, such as the significant (20.3 %) gender gap in employment; the lack of women in political decision-making positions; the lack of public infrastructure for care; and the existence of gender stereotypes, various forms of sexism and harassment, which affect women's careers.

Multi-level governance structure

To maintain participatory implementation, the plan proposed to establish a carefully designed governance mechanism comprising two complementary bodies:

- Steering Committee: this included representatives from government ministries, civil society organisations, women's rights advocates and academia, to provide strategic guidance and oversight.
- Technical Committee: this comprised technical experts from various institutions to provide specialised expertise on gender equality, economic empowerment and political participation.

This two-tier approach both enabled high-level policy coordination and provided access to expertise in technical implementation, creating pathways for ongoing stakeholder input throughout the lifecycle of the National Plan.

Participatory monitoring and evaluation

The participatory approach extended to monitoring and evaluation processes through a dedicated Monitoring Task Force, designed to include:

- government representatives tracking implementation;
- civil society organisations providing independent assessment;
- academic institutions contributing evaluation expertise; and
- social partners who negotiate working conditions that directly affect women's economic empowerment.

The terms of reference of the Task Force explicitly call for "stakeholder consultations, workshops and other engagement activities to gather feedback" on the progress of implementation, ensuring that monitoring process remains participatory rather than being a top-down assessment.

Conclusions

Romania's participatory approach demonstrates that inclusive stakeholder engagement, embedded across planning, implementation and monitoring, can strengthen the relevance, ownership and impact of gender equality policies.

Source: Analysis of the contents of National Plan for Women's Economic and Political Empowerment, Gender Flagship Project.

CASE STUDY 2: INTERVENTION LOGIC FOR ROMANIA'S NATIONAL PLAN FOR WOMEN'S ECONOMIC AND POLITICAL EMPOWERMENT

Introduction

Romania's National Plan for the Economic and Political Empowerment of Women, supported by the EU-funded Gender Flagship Project, establishes a clear and structured intervention logic that connects high-level goals to concrete actions. This case study examines how the plan articulates its theory of change and implements a results-oriented approach.

Theory of change framework

The National Plan explicitly presents its theory of change as the foundational logic that guides interventions, as follows:

If:

- private and public employment policies are more gender-responsive, in order to increase the number of women obtaining and retaining jobs;
- care policies, services and planned infrastructure meet the demand for care by women and men of all ages wishing to work;
- higher participation by women in the economic and political spheres strengthen productivity and democracy; and
- gender-based violence at work is addressed and prevented in public and private institutions,

Then:

More women will participate and: take up new or maintaining decent jobs within the formal economy; take up elected office; participate in political decision-making; have a stronger presence in decision-making in private enterprise; and strengthen all economic aspects in the country as well as the democratic process.

Because:

- more gender-responsive legislation and institutional services and policies have been created, with stronger commitments from the public and private sectors;
- the recognition, reduction and redistribution of unpaid care work will reduce informal work and create new jobs in the care sector;
- guarantees for more balanced political and economic decision making will have been strengthened;

- women's interests will be better represented at a political level; and
- violence-free working environments have been created.

Strategic priority structure

Building on this theory of change, the plan establishes four priority directions with explicit interconnections:

1. **Engendering labour market policies** (including through EU structural funding)
2. **Work-life balance** (focusing on care economy elements)
3. **Participation in decision-making** (in economic and political spheres)
4. **Reducing gender-based violence at working environments and in public spaces**

Hierarchical structure of objectives

The intervention logic includes:

- **Main objective** : “To identify and implement measures and activities that lead to higher levels of economic and political empowerment of women in Romania”.
- **Six specific objectives** that operationalise the main goal, namely: (1) reviewing legislation, (2) identifying resources, (3) improving access to skills, (4) fostering entrepreneurship, (5) increasing the political representation of women, and (6) establishing monitoring frameworks.
- **Concrete measures** tied to each specific objective (totalling over 50 defined measures).

Input–output–outcome framework

Each measure in the National Plan is supported by a structured results framework, specifying the entities responsible, timelines and funding sources. Outputs and outcomes are linked to measurable indicators, with defined baselines, targets and verification sources to ensure accountability and track progress.

Integration of monitoring and evaluation

Monitoring and evaluation are embedded into the implementation structure of the National Plan. This includes dedicated governance mechanisms and a Monitoring Task Force. Regular reporting and scheduled evaluations are used to assess progress and support continuous improvement.

Conclusions

The Romanian approach demonstrates how a gender equality plan can establish a comprehensive intervention logic that connects theoretical foundations (theory of change) with concrete implementation mechanisms and measurable results.

Source: Analysis of the contents of National Plan for Women's Economic and Political Empowerment, Gender Flagship Project.

6.2 Examples from the support delivered by the Gender Flagship Project to Hamburg

CASE STUDY 3: HAMBURG'S PROCESS FOR GENDER EQUALITY ASSESSMENT AND TARGET DEVELOPMENT

Introduction

Through the EU-funded Gender Flagship Project, the project team provided technical support to the Free and Hanseatic City of Hamburg to develop a structured process for gender equality assessment. This resulted in a comprehensive manual and administrative checklist form that guides authorities in systematically evaluating their policies and services from a gender perspective.

The challenge

Hamburg's administration needed practical tools to implement gender mainstreaming across all government functions. While high-level policy frameworks existed, departments lacked a standardised process to:

- determine whether policies had gender equality implications;
- analyse current gender disparities in their service areas;
- formulate specific gender equality objectives; and
- develop appropriate indicators to measure progress.

The Gender Flagship Project's contribution

Technical assistance from the Gender Flagship Project supported Hamburg in developing a practical six-step assessment process, documented in a detailed checklist form and an accompanying manual for administrative use. This process guides authorities through a systematic gender assessment pathway.

The six-step gender assessment process

Step 1 : Preliminary examination for gender equality relevance

This initial screening determines whether a service area or offer requires further gender analysis. Specifically, it:

- examines whether the area has direct or indirect impacts on the population;
- identifies who is directly (target groups) and indirectly affected;
- recognises that most public services have gender implications; and
- requires justification if it is determined that gender analysis is not needed.

As stated in the manual: as a rule, as soon as a service has a direct or indirect impact on the population, an in-depth review of the current situation in the relevant area of responsibility is necessary.

Step 2 : Equality audit

This comprehensive assessment analyses the current situation from a gender perspective:

a) Description of purpose and target groups

- Clarifies why the service/offer exists.
- Identifies specific target groups as precisely as possible.

b) In-depth analysis of current gender equality situation

This uses the “4-R” (in German) method to provide a multidimensional view of:

- Representation: examining the proportions of women and men in target groups
- Resources: analysing the distribution of money, time, space and other resources
- Reality: understanding causes of gender differences
- Legal situation: assessing whether regulations help to overcome inequalities

The manual states that the question to be answered here is who currently has or receives what, and why? Consider the target group(s) separately by gender (female, male and possibly diverse).

c) Identifying gender equality-related governance needs based on the prior analysis

What conclusions do you draw from the above analysis? Do new/additional requirements arise in the area of responsibility?

Step 3 : Gender equality policy objectives and measures

Based on the findings from the equality audit, this step involves:

a) Identifying relevant political and legal mandates

These should connect with Hamburg's key gender equality objectives:

- Equal participation in important goods
- Adequate participation in organisation and decision-making
- The dissolution of gender-stereotypical role expectations
- Shaping structure and culture without gender stereotypes
- A balanced distribution of burdens
- The gender-equitable distribution of public funds and state benefits

b) Formulating specific gender equality objectives

Concrete objectives should be developed for the specific service area, such as:

- Transport: "Increasing mobility opportunities for women"
- Education: "Broadening career choices for girls and boys"

c) Defining implementation measures

Specific actions should be identified to achieve gender equality objectives. For example:

- Creating dense public transport stop networks to support complex journey patterns
- Implementing support programs to address gender gaps in career fields

d) Establishing key performance indicators

Indicators should be developed that meet the defined criteria for effectiveness:

- Characteristic: reflecting key aspects of the objective
- Affordable: representing an appropriate relationship between data collection effort and its benefits
- Integrated: incorporated into management processes

- Comparable: trackable over time
- Rich: meaningful from multiple perspectives
- Reliable: with clear data sources and calculation methods

e) Setting target values

Defining ambitious but realistic target values with clear deadlines.

Step 4 : Evaluation of target achievement

This step establishes processes for:

- assessing whether objectives have been achieved;
- analysing reasons for non-achievement (where applicable); and
- identifying necessary adjustments to measures.

Step 5 : Budget allocation for gender equality

Transparency should be ensured with regard to:

- financial and human resources contributing to the achievement of gender equality objectives
- share of budget contributing to gender equality outcomes

Step 6 : Integration with Hamburg's gender equality instruments

It should be ensured that assessment results are fed into:

- Gender Equality Policy Framework Programme (GPR)
- Gender Responsive Budgeting (GWHS)
- Hamburg Gender Equality Monitor

IMPLEMENTATION TOOLS

The project delivered two key tools:

Comprehensive manual

This provides detailed guidance on each step, complete with:

- theoretical background and explanations;
- sector-specific examples from education, transport, culture and health;
- visual elements to enhance understanding; and
- an in-depth case study of the public transport analysis.

Structured checklist form

This is a practical interactive PDF-based form that guides administrators through the six-step process, including:

- sequential sections that follow the assessment process;
- fields for documenting findings at each stage;
- guidance notes for completion; and
- space to document objectives, measures and indicators.

Conclusions

Hamburg's six-step process provides a transferable model for other regions seeking to systematically assess their policies from a gender perspective and to develop targeted interventions with measurable indicators.

Source: analysis of "Brief guidelines for the development and review of gender equality targets and indicators and accompanying checklist form", Gender Flagship Project.

6.3 Examples from the support delivered by the Gender Flagship Project to Saxony-Anhalt

CASE STUDY 4: SAXONY-ANHALT'S APPROACH TO GENDER EQUALITY INDICATORS

Background and policy framework

With support from the EU-funded Gender Flagship Project, the federal state of Saxony-Anhalt developed a comprehensive system of gender equality indicators that aligns with its constitutional mandate. Article 34 of Saxony-Anhalt's constitution establishes the obligation for state and municipal authorities to promote gender equality in all areas of society through appropriate measures.

To fulfil this mandate, Saxony-Anhalt created the State Programme for a Gender-Equal Saxony-Anhalt (Landesprogramm für ein geschlechtergerechtes Sachsen-Anhalt). This establishes gender equality policy goals that define equality and provide direction for the state's equality policy. The Gender Flagship Project provided technical assistance in developing this structured approach to gender equality indicators.

Methodological approach for selecting indicators

As shown in the introduction of the Saxony-Anhalt indicators paper, the project employed a clear prioritisation methodology for selecting indicators:

1. Relevance to Saxony-Anhalt's key gender equality objectives,
2. Need for action in Saxony-Anhalt,
3. Comprehensibility, and
4. Feasibility (resources required for data collection, calculation and regular updating).

The methodology explicitly states that for the development and selection of gender equality indicators, their significance in relation to the state's goals for gender equality policy was the primary criterion. In addition, the need for action in Saxony-Anhalt in particular was taken into account when selecting indicators. Only in third place did the availability of data serve as a selection criterion."

While the list of indicators only included those indicators for which data sources were available or could be generated, it is acknowledged that the effort required in order to update different indicators differs considerably.

Comprehensive thematic structure

The Saxony-Anhalt indicator system is structured around eight key gender equality goals, namely:

1. **Participation:** equal participation in decision-making processes.
2. **Economic independence:** equal access to financial resources, employment and social security.
3. **Protection from violence:** prevention of gender-based violence.
4. **Dismantling gender stereotypes:** promoting acceptance of gender diversity.
5. **Participation in culture and science:** equal access to cultural and knowledge creation.
6. **Health:** gender-responsive healthcare and care services.
7. **Care work:** the recognition and redistribution of care responsibilities.
8. **Public infrastructure:** gender-responsive planning and design.

For each of the above policy goals, between 3 up to 5 specific indicators are defined, with detailed descriptions.

Standardised indicator documentation

The Saxony-Anhalt indicators employ a consistent format for documentation, consisting of:

1. **Definition:** a clear explanation of what the indicator measures.
2. **Data source:** identification of where the data come from.
3. **Current value:** the most recent measurement, often comparing Saxony-Anhalt to Germany overall.
4. **Description:** an explanation of the indicator's significance and any limitations.
5. **Update procedure:** detailed instructions for updating the indicator value.

For example, the indicator “Proportion of women in the state parliament” includes:

- Definition: the percentage of women holding mandates in the state parliament.
- Data source: official election statistics and the Gender Equality Atlas.

- Current value: 28 % (2023).
- Update procedure: instructions on how to retrieve the current value from the Gender Equality Atlas.

Addressing challenges in data collection

The work produced through the Gender Flagship Project acknowledges several data challenges, and outlines approaches to address these:

1. **Missing gender data:** with respect to indicators such as “Proportion of women in civil society interest groups”, it is noted that the relevant data are “currently not available”. However, a meaningful source of information on civil society interest groups (the lobby register of registered representations at the state parliament) is identified, and an evaluation procedure is defined.

2. **Complex calculations:** the calculations for indicators such as «Existentially secure employment for women” require “commissioning a recalculation of the threshold values for defining the existential minimum and the gross income necessary for sufficient entitlements over the life course”.

3. **Data from different sources:** many indicators require the combining of data from multiple sources. The indicator “Teenage pregnancy rate” must be calculated by combining birth statistics, abortion statistics and population statistics.

Supplementary indicators

Beyond the core indicators, the Saxony-Anhalt approach includes supplementary metrics (ergänzende Kennzahlen) for each policy area. These provide additional context and depth for the analysis of gender equality issues. These supplementary metrics include only indicators that are regularly available in public data sources.

For example, in the “Economic independence” section, the supplementary indicators include:

- Part-time employment rate of women of prime working age
- Involuntary part-time work among women
- Employment rate among low-qualified women and men
- Gender pension gap

This two-tier approach allows focused monitoring via core indicators while providing additional data for more comprehensive analysis.

Context for comparative analysis

The Saxony-Anhalt indicators consistently provide context for comparative analysis:

1. **National comparison** : most indicators include values for both Saxony-Anhalt and Germany as a whole, allowing benchmarking against national averages.

For example, the indicator “Teenage pregnancy rate” provides the following information:

- Saxony-Anhalt: 16.0; Germany: 9.7 (per 1,000 female inhabitants aged 15 to 19 years, 2023)

2. **Gender comparison** : where appropriate, indicators present data for women and men and for specific groups of women and men, thereby facilitating intersectional gender analysis.

For example, the indicator “Employment rate among foreign women” provides the following information:

- Without German citizenship 2023: women, 37 %; men, 58%
- All employees 2023: women, 74 %; men, 75 %

This comparative approach provides important context for interpreting the state’s performance in gender equality.

Conclusions

The Saxony-Anhalt approach to gender equality indicators, developed with support from the Gender Flagship Project, demonstrates a comprehensive, policy-driven system for monitoring progress towards gender equality. Key features include:

1. Prioritising policy relevance over data availability
2. Covering eight distinct policy goals through the use of specific indicators
3. Standardised documentation of indicators and procedures for updating
4. Addressing data collection challenges with specific plans
5. Supplementing core indicators with additional metrics
6. Providing comparative context through national and gender comparisons

This case illustrates how the principles of effective gender equality monitoring can be implemented at a regional level, with detailed attention being paid to both conceptual significance and practical implementation requirements. The technical support provided by the Gender Flagship Project was instrumental in creating this structured and comprehensive approach to gender equality indicators for Saxony-Anhalt.

Source: Analysis of “Equality Indicators for the State Programme for a Gender Equal Saxony-Anhalt”, Gender Flagship Project.

CASE STUDY 5: ESTABLISHING REPORTING MECHANISMS FOR THE SAXONY-ANHALT GENDER ACTION PLAN

Background

With support from the EU-funded Gender Flagship Project, Saxony-Anhalt established comprehensive coordination mechanisms for gender-responsive policies. A key component of this support was the development of the “Reporting module” toolkit, designed to strengthen the verifiability and transparency of the implementation of Saxony-Anhalt’s Gender Action Plan (GAP).

“Reporting module” toolkit

This toolkit consists of four complementary parts that together form a comprehensive reporting system:

Part 1 : Description of measures

This document template serves to prepare a resolution on measures for the state programme. It establishes the foundational information for each gender equality measure.

Part 2a : Accompanying sheet for the preparation of the report

The description of the measures (part 1) for the political decision-making process is often more general. This form supports in-depth technical structuring in the form of a logic model. It expands on the description of the proposed measure with additional reporting elements to be carried out by ministries, focusing on planned activities and expected results.

Part 2b : Explanation of the supplementary sheet

This comprehensive guidance document provides detailed instructions and examples for completing the supplementary form, with examples covering different types of measures and guidance on developing appropriate indicators.

Part 3 : Reporting form

This structured documentation form collects information on the actual implementation status and results achieved. It includes:

- administrative information (date, department, contact person);
- name of the measure and resources (personnel and financial resources used, function code according to COFOG/ESA2010);

- Implementation status (in preparation, in progress or terminated);
- Implementation timeline (actual start and expected completion dates);
- Brief description of the activities implemented so far
- Description of the services provided (output), with space to attach the documents produced or extracts from them;
- Output indicators, with values and sources;
- Description of the results achieved so far;
- Results indicators, with values and sources (if available); and
- Description of the contribution made to departmental gender equality objectives or state gender equality goals.

The form is specifically designed to provide continuity throughout the reporting process by using the same numbering system as earlier forms, thereby enabling the efficient tracking of measures from planning to implementation.

Conclusions

With support from the Gender Flagship Project, Saxony-Anhalt established a robust reporting system to enhance the transparency and accountability of its Gender Action Plan. The newly developed “Reporting module” toolkit enables consistent tracking of gender equality measures from planning through to implementation. This approach strengthens institutional capacity and lays down a strong foundation for sustainable gender mainstreaming across state policies.

Source: Analysis of “Reporting Module”, Gender Flagship Project.

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