

Gender Budgeting

Step 1: Ex ante approach

The presentation of national or regional programmes follows a common structure, with a logic of defining targeted priorities and chosen specific objectives – according to the EU’s overall principles and priorities. Nevertheless, a substantial variety is to be expected between programmes as to the different strengths and chances, challenges and problems faced by the Member States. As such, interventions and measures of Member states will differ considerably even if presented under the same specific objective.

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After looking at the intervention codes and the suggested gender code for these in Annex 1, each intervention field addressed will obtain a weighting of:

- 100 %** – interventions/operations where gender equality is the principal objective (‘gender targeting’ according to the CPR);
- 40 %** – interventions/operations assumed to have a substantial positive impact, where gender equality is explicit in the intervention (‘gender mainstreaming’ according to the CPR); or
- 0 %** – interventions/operations with no discernible impact on gender equality that are ‘gender-unaware’ or ‘gender-exploitative’ (‘gender-neutral’ according to the CPR).

Furthermore, to follow the intention explained in the OECD definitions and ensure that programmes have a real impact on gender equality, this tool adds a fourth code (0 %*) to a number of interventions, in line with the approach currently being developed by the Commission for the tracking of gender equality-related expenditure in the EU budget. This code indicates that it requires an *ex ante* assessment, based on the minimum criteria to move intervention codes to 40 %.

Otherwise, it remains as 0 %. This is to ensure that an intervention field with a potential to be gender responsive, in practice, benefits gender equality and can be moved to 40 %. As a rule, the measures and interventions implemented under the respective intervention field must explicitly contribute to alleviating gender-specific inequalities and constraints^[1] through a gender mainstreaming process in design and implementation^[2].

For the 100 % and 40 % categories minimum criteria are assumed to be fulfilled as a standard (for the *ex ante* indication). By the pre-classification of intervention fields, only one intervention field is classified as 'principal' or 'gender targeting' (100 %). Other intervention fields are pre-classified as either 'significant' or 'gender mainstreaming' (40 %, mainly childcare and care-related) or 'principal' or 'gender targeting' (100 %).

They are clearly contributing to improving the situation of women. Nevertheless, in order to keep a transformative approach in mind and not 'keep and/or reinforce traditional roles', they are classified as 40 % or 100 %. The classification as 'principal' or 'gender targeting' (100 %) may be attributed deliberately for interventions that fulfil minimum criteria. The *ex ante* categorisation based on intervention fields will have to be assessed individually for each operation later in the implementation of the programme. This process is explained in the *ex post* assessment section (step 2).

Weight 100 %: Interventions/operations where gender equality is the principal objective ('gender targeting' in the CPR).

These interventions have gender equality as the main objective with the intention of advancing gender equality and/or the empowerment of women and girls, reducing gender discrimination or inequalities or meeting gender-specific needs and meet the minimum criteria listed below.

A gender analysis of the programme has been conducted.

Findings from the gender analysis have informed the design of the programme.

Addressed gaps and challenges are in line with gender equality policies at EU and/or national level.

The top-level ambition of the programme is to advance gender equality and/or women's empowerment.

The results framework measures progress towards gender equality objectives through gender-specific indicators.

Data and indicators are sex-disaggregated where applicable.

Commitments to monitor gender-equality results are set

Weight 40 %: Interventions/operations assumed to have a substantial positive impact, where gender equality is explicit in the intervention ('gender mainstreaming' in the CPR).

These interventions are categorised as interventions 'assumed to have a positive impact' (40 % weight) due to the nature of the programme. However, they also need to meet the minimum criteria listed below (*ex ante*, if not they should be marked as 0 %*).

A gender analysis of the programme has been conducted

Findings from the gender analysis have informed the design of the programme.

Addressed gaps and challenges are in line with gender equality policies at EU and/or national level.

At least one explicit gender-equality objective is identified.

Data and indicators are sex-disaggregated where applicable.

Commitments to monitor gender-equality results are set.

Weight 0 %* (only in ex ante): Interventions that might have a positive impact on gender equality, but need to demonstrate the use of gender mainstreaming.

These interventions require an *ex post* programme-specific assessment. In order for them to be recategorised as interventions (40 % weight), they need to meet the minimum criteria listed below.

A gender analysis of the programme has been conducted.

Findings from the gender analysis have informed the design of the programme.

Addressed gaps and challenges are in line with gender equality policies at EU and/or national level.

At least one explicit gender equality objective is identified.

Data and indicators are sex-disaggregated where applicable.

Commitments to monitor gender-equality results are set.

Weight 0 %: Interventions/operation with no discernible impact on

gender equality, that are ‘gender-unaware’ or ‘gender-exploitative’ (‘gender-neutral’ in the CPR).

These interventions are considered as not needing to take gender equality into account, not having had a gender assessment or not having sufficient information in relation to the minimum criteria.

This category will therefore include both operations ‘not targeting gender equality’ and operations that have not been assessed as gender responsive based on minimum criteria. Hence, the aim must be to reduce the number of operations that are not assessed, as these can be classified as ‘not changing the status quo’, ‘gender-unaware’ or ‘gender-exploitative’ (i.e. they may unintentionally contribute to the continuation of gender stereotypes and gender gaps).

To avoid a negative impact, it is recommended to apply a ‘do no harm’ assessment as presented above (analyse the potential risks of unintentionally perpetuating or reinforcing gender inequalities in the context of the intervention, proactively monitor risks and take corrective/compensatory measures).

Footnotes

[1] Gender constraints prevail due to existing gender norms and roles in society. To address gender inequalities and constraints, the programme must meet gender-specific needs and priorities and intend to transform unequal power relations and challenge discriminatory gender norms, attitudes and behaviours.

[2] Due to the operational programmes being structured along priorities and specific objectives, managing authorities will have to combine information presented for the specific objectives with information about addressed intervention fields in order to define the adequate category for intervention fields marked as 0 %*.