

# EXPERTISE FRANCE

## Gender Mainstreaming in Public Policy and Budgeting

Inception report  
November 2022

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<b>Contract Title</b>	<b>IMPLEMENTATION OF THE “GENDER MAINSTREAMING IN PUBLIC POLICY AND BUDGETING” PROJECT</b>
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<b>Beneficiaries</b>	(France) City of Strasbourg- (Germany) Lander of Berlin- Lander of Hamburg – Lander of Sachsen Anhalt - (Portugal) the Portuguese Commission for Citizenship and Gender Equality – (Ireland) the Irish Department of Children, Equality, Disability, Integration and Youth – (Greece) the Greek General Secretariat for Demography, Family Policy and Gender Equality/GSDFPGE – (Romania) Romanian National Agency for Equal Opportunities Between Women and Men (NAEO) – (Italy) the Italian Department of Equal Opportunities
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## LIST OF ABBREVIATIONS

DG REFORM	Directorate-General for Structural Reform Support
EF	Expertise France
EIGE	European Institute for Gender Equality
EUI	European University Institute
GAP	Gender Action Plan
GEP	Gender Equality Proofing
GIA	Gender Impact Assessment
GM	Gender Mainstreaming
GRB	Gender Responsive Budgeting
LTE	Long Term Expertise
MS	Member State(s)
STE	Short Term Expertise

# 1. INTRODUCTION

## 1.1 General context

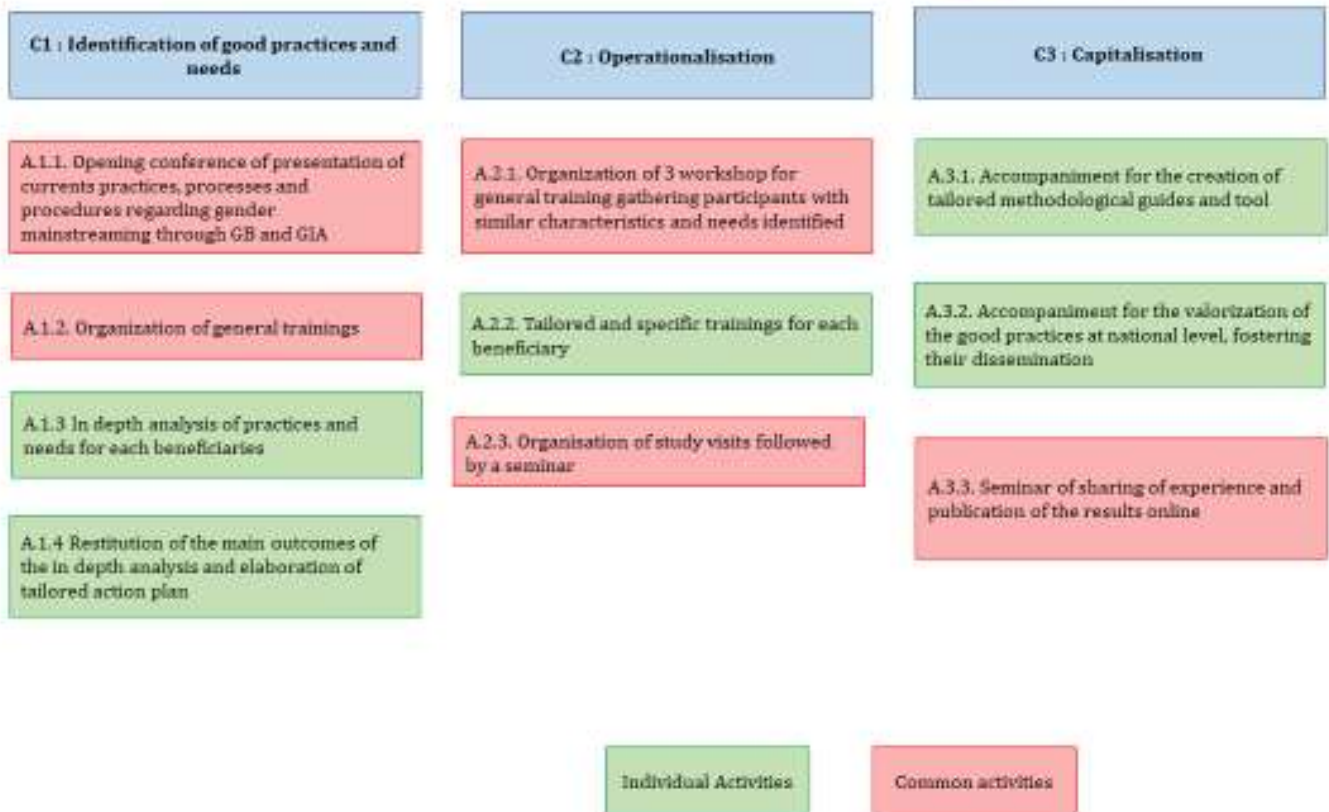
The inception report is prepared in the framework of the implementation of the “Gender mainstreaming in public policy and budgeting” project.

Seven Member States and nine beneficiary authorities (namely the city of Strasbourg; the German landers of Berlin, Hamburg and Sachsen Anhalt; the Commission for Citizenship and Gender Equality in Portugal; the General Secretariat for Demography, Family Policy and Gender Equality in Greece; the National Agency for Equal Opportunities Between Women and Men in Romania; the Department of Children, Equality, Disability, Integration and Youth in Ireland and the Department of Equal Opportunities in Italy) are benefitting from common activities, such as workshops and general trainings and individual technical support. However, Italy’s participation is limited to collective activities, as they choose to be supported individually from another TSI call. For this reason, for activities gathering all beneficiaries we will be talking about 7 Member States, and for the Individual ones, will be talking of 6 Member States.

This 30-month project will combine “collective” activities gathering all beneficiary authorities and “individual” activities.

- **Activities gathering beneficiary authorities:** All beneficiary authorities in the seven Member States or some of them with similar characteristics or interest will meet for seminars, workshops or study visits. They will be able to exchange on their needs, practices, as well as on the challenges they may face or the opportunities they can meet. These interactions will enable peer to peer exchanges to foster a European *will* toward the systemic integration of the GM and GRB approaches.
- **Activities organised per beneficiary authority:** There is an important variety in the level of governance or field of action among the beneficiary authorities. Moreover, the level of development of policies for gender equality, or integration of GM and GRB differs among beneficiary authorities in the six Member States. In order for the support to be fully adapted to the support requested, to the needs identified and to the authorities’ specificities, an important part of the activities will be implemented for each beneficiary authorities in the Member States individually.

## Project activities



The Project was officially launched with 5 online kick-off meetings held between the 19<sup>th</sup> of September and the 7<sup>th</sup> of October. Only the Irish kick off is to be organised. A first date was established the 29<sup>th</sup> of September but it was postponed. For Italy, the kick off will be organised by the other DG Reform project considering the number of activities organised by this second project. The German landers' kick offs have been organised simultaneously considering their common request to the DG Reform.

These kick offs, one per Member State, aimed at endorsing the proposed structure of the project and the implementation modalities by Expertise France (EF), by bringing together the relevant beneficiary institutions, stakeholders and the team of experts.

### 1.2 Objectives of the project

The general objective of the project is to contribute to the integration of Gender Mainstreaming (GM), through the application of Gender Responsive Budgeting (GRB), Gender Impact Assessment (GIA), Gender Action Plans (GAP) or other relevant tool, in order to foster the implementation of policies that better take into account equality between women and men.

Expertise France, through local and international gender expertise, will support seven Member States and 9 beneficiary authorities, in:

- Assessing the impact of policies on gender through better collection, analysis, use and dissemination of gender sensitive data, and;
- Addressing gender inequalities in public policies by implementing effective gender mainstreaming tools

The implementation phase will consist of **3 components** addressing complementary needs in order to reach the general objective:

- (i) **Elaboration of action plans:** Analysing the practices and confirming specific needs and priorities of each beneficiary authority in order to strengthen gender mainstreaming through the application of GM tools such as GRB, GAPs or GIA;
- (ii) **Operationalisation:** Building capacities and structures for the implementation of GRB, GIA or GAP tools at the level of departments of each beneficiary authority in application of elaborated action plans;
- (iii) **Capitalisation:** Embedding the new best practices of gender mainstreaming and enabling their transfer and sharing and duplication across institutions, across member states.

This project aims for concrete structural change. Indeed, when many previous projects have remained at the level of awareness raising of public servants, this project aims to go further by accompanying all nine beneficiary authorities in seven Member States in the application of concrete tools and methodologies.

To maximise and facilitate the participation, a part of the activities will be implemented virtually. Whereas other project activities are geared towards direct (in-person) participation and interaction between beneficiaries to build considerable knowledge and skills.

## 2. OBJECTIVES AND METHODOLOGY OF THE INCEPTION REPORT

A series of reports will be produced in order to monitor the implementation of the project and report both to the beneficiary authorities and the DG Reform.

This inception report aims at analysing the situation at the beginning of the project, by describing any changes made in terms of calendar, presentation of the updated logical framework.

This report will present the activities made during the opening and introductory phases from the 15<sup>th</sup> of June until the end of October 2022.

The Opening phase is the first individual activity for each beneficiary authority. According to the project description, the opening phase consisted in:

- Reconfirming the exact order of each project activity in order to be consistent to each beneficiary authority requests;
- Organising for each beneficiary authority a high level kick-off in order to launch the project and politically endorse the project methodology.
- Finalising the Monitoring and Evaluation plan
- Elaborating a communication plan

The introductory phase is to be addressed to all beneficiary authorities, consists in:

- The organisation of an opening conference gathering all beneficiary authorities
- The elaboration of virtual general trainings on gender mainstreaming tools

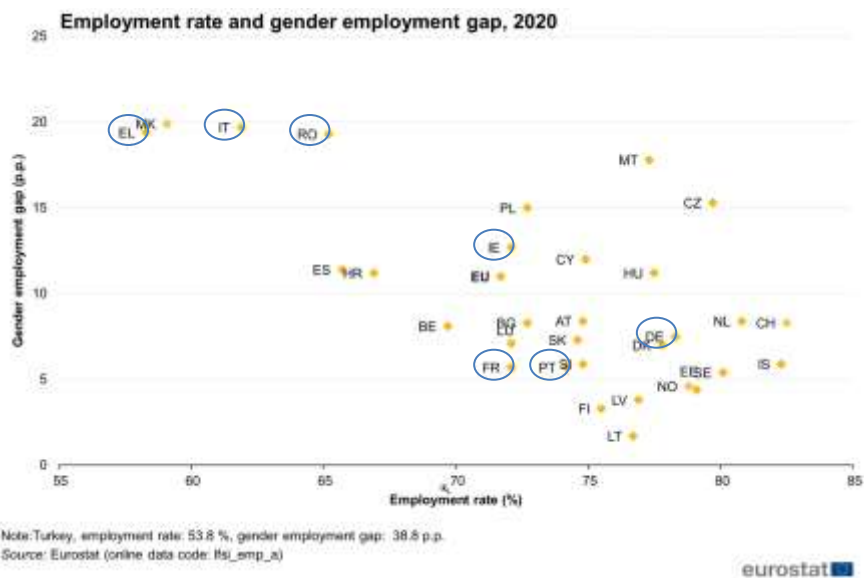


### 3. CURRENT STATE OF PLAY AND OBJECTIVES OF PROJECT ACTIVITIES

The promotion of gender equality is a task for the European Union, in all its activities, required by the Treaties. Gender equality is a core value of the EU, a fundamental right and key principle of the European Pillar of Social Rights. The European Union is a global leader in gender equality. However, no Member State has achieved full gender equality and progress is slow.

Each beneficiary authority, despite the implementation of Gender action plans since the beginning of 2000's (for example in the lander of Berlin) have seen little progress in gender equality and gaps persists in labour market and political participation, in the division of domestic tasks between spouses or even in the public space.

**Graph 1: Women are less employed than men in all EU countries, but particularly in Italy, Greece and Romania**



**Table 1: Women are more likely to work part-time in order to take in charge domestic tasks and children education**

Percentage of part-time employment of adults by sex, age groups, number of children and age of youngest child in 2019 (in %)	Males	Females
<b>EU Member states</b>		
European Union - 27 countries	7,8	28,2
Germany	9,8	44,4
Ireland	8,2	26,3
Greece	6,8	15,1
France	7,4	26,4
Italy	9,1	35,0
Portugal	4,6	9,6
Romania	4,9	5,1

Source: Eurostat

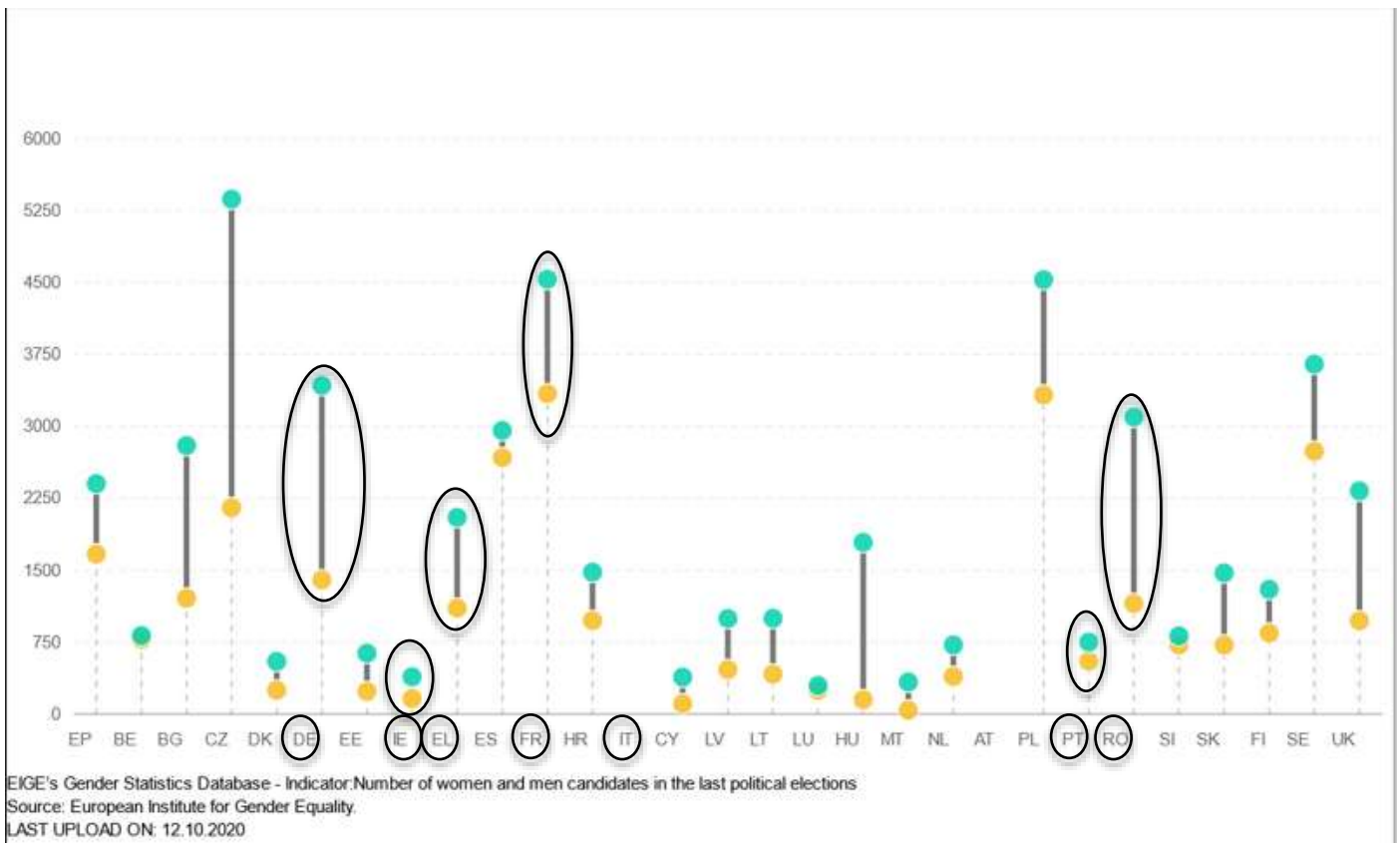
**Table 2: Except in Romania, women earn less particularly after childbearing age (the child penalty)**

Gender pay gap in unadjusted form by age	2018			
	Less than 25 years	25 to 34 years	35 to 44 years	45 to 54 years
<b>Germany</b>	6	9,9	18,7	25,6
<b>Ireland</b>	-5,3	5,7	15,0	10
<b>Greece</b>	4,2	1,6	9,0	9,8
<b>France</b>	3,5	10,7	13,5	19,6
<b>Italy</b>	4,9	5,8	4,8	7,5
<b>Portugal</b>	3,1	4,7	9,8	13,7
<b>Romania</b>	5,6	8,4	4,5	-1,7

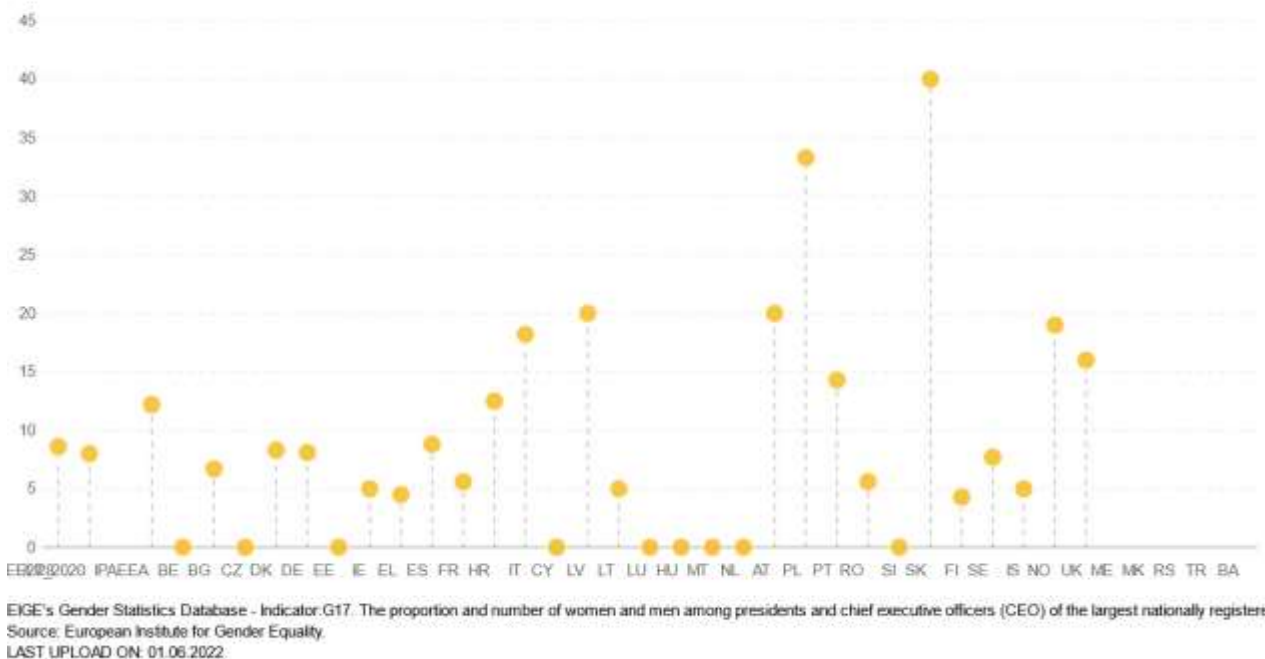
Source: Eurostat

**Graph 2: In all EU Member states, gender gaps persist in candidatures in the last political elections**

● Men      ● Women



**Graph 3: In all EU Member states, except Slovakia and Poland, women represent less than 25 % of presidents and chief executive officers (CEO) of the largest nationally registered companies listed on the national stock exchange**



In order to fill those gaps, each beneficiary authority wants to strengthen mainstreaming of gender equality by increasing the capacity of policy officers within their administration to take into account gender in the budget and policy making processes.

According to the OECD 2016 gender budgeting survey, almost half of OECD countries (15 out of 34 members) have introduced (Austria, Belgium, Finland, Iceland, Israel, Japan, Korea, Mexico, Netherlands, Norway, Spain, Sweden), 4 plan to introduce (Italy) or are actively considering the introduction (Turkey, Czech Republic) of gender budgeting<sup>1</sup>.

Since then, other countries have been implementing pilots on gender budgeting and gender tagging (France, Portugal, Ireland). The OECD is currently working on a gender budgeting index, presented in September 2022. The results will be published in 2023.

Considering beneficiary authorities, different experiences in terms of implementation of gender mainstreaming tools have to be noted.

For instance, Berlin, Ireland and Hamburg have already implemented GRB tools and GAPs and the city of Strasbourg and Portugal have implemented GRB pilot projects respectively in 2021 and 2018 and have been trained by local experts. Countries such as Greece and Romania, should start from basics. However, they did not all exploited gender mainstreaming instruments such as ex-ante or ex-post gender impact assessments.

<sup>1</sup> Ronnie Downes et al., Gender Budgeting in OECD countries, OECD Journal on Budgeting, volume 2016/3, 2017

For this reason, the project presents two different types of activities (individual and collective) in order to both foster peer-to-peer exchange, and promote an *ad hoc* support.

In order to have a consistent expertise with a deep knowledge of the local context, the choice was made to have for each beneficiary authority a “focal point” expert that will be in charge of all the individual activities and international short-term experts to offer a comprehensive support on gender mainstreaming instruments.

### **3.1 Opening phase: activity “adaptation of the activities and development of a plan for M&E”**

From July 11<sup>th</sup>, the starting date of the Head of project, a round of meetings between beneficiary authorities, Expertise France and the DG Reform took place in order to adapt the technical offer to the specific needs and expectations on each beneficiary authority. During this introductory period, the project team has also continued to recruit local and international experts and finalize the project team.

Each meeting was held online. Please find below the calendar of those first meetings:

- The 12<sup>th</sup> of July 2022: meeting with the City of Strasbourg (Sophie Clerc, gender equality officer, is the contact person for Expertise France).
- The 13<sup>th</sup> of July 2022: meeting with the Italian equal opportunities department (Gianluca Aliquo, is the contact person for Expertise France).
- The 13<sup>th</sup> of July 2022: meeting with the Greek department of European and International cooperation within the General secretariat for demography, family policy and gender equality (Georgia Papageorgiou and Christina Agoritsa are the contact person for Expertise France).
- The 18<sup>th</sup> of July 2022: meeting with the Romanian National commission in the field of equal opportunities between women and men (Gianina Dimitriescu is the contact person for Expertise France).
- The 19<sup>th</sup> of July 2022: meeting the Commission for citizenship and gender (Ana Martinho Fernandes and Sara Texeira are the contact person for Expertise France).
- The 19<sup>th</sup> of July 2022: meeting with the Irish department of Children, Equality, Disability, Integration and Youth (Deirdre O’ Neill is the contact person for Expertise France).
- The 26<sup>th</sup> of July 2022: meeting with the Department for Higher Education and Research, Health, Long-Term Care and Gender Equality of Berlin (Alina Zimmermann is the contact person for Expertise France).
- The 24<sup>th</sup> of August 2022: meeting with the Ministry of Labour, Social Affairs, Health and Gender Equality of Sachsen-Anhalt (Johen Geppert is the contact person for Expertise France).
- The 30<sup>th</sup> of August 2022: meeting with the Ministry of Science, Research, Equality and Districts Office for Equality and Social Cohesion of Hamburg (Anita Boje-Nasution is the contact person for Expertise France).

For each beneficiary authority, the project team has prepared a tailored timeframe sheet with the division of the expertise days by project activity in order to support each beneficiary authority with tailored expertise.

According to their request and the specificity of the project, beneficiary authorities will benefit from the technical assistance and help of at least one local gender expert, aware of the local context and with the ability to scrutinize policy documents and reports and communicate with a range of departments and institutions in the local language. This expert called the “focal point” or “local expert” will be mobilised to support the deployment of the project and provide technical support adapted to the specificities of each beneficiary for the entire duration of the project. The

local expert will be supported by a team of international experts on gender responsive budgeting and gender data. Other private or public expertise will be mobilized depending on the specific needs of each beneficiary.

### **3.2 Opening phase: activity “Kick off meeting”**

From the 19<sup>th</sup> of September to the 7<sup>th</sup> of October 2022, 5 kick offs (for Greece, Strasbourg, Romania, Portugal and the three German länder) have been organized by Expertise France, with beneficiary authorities and DG Reform.

Four of them have been organized virtually in order to ensure the participation of political authorities. The one organized in Strasbourg was in person because it was part of the restitution of a pilot project on GRB on the same day.

The objective of kick offs is to politically endorse the methodology of the project, present the overall framework and the specific activities according to the timeframe. For each kick off, a tailored presentation has been elaborated by the project team in order to summarize the local context and their request.

Political level representatives authorities have all been present in order to open the kick offs and present the priority area of intervention and their expectations about the project.

During each kick off, administration representatives, the project team and the local experts have met in order to:

- overview the country specific component (for next 6-months), the planned activities and to detailing the calendar for the first mission
- prepare the national steering committee, its composition, term of reference and its first meeting
- discuss on the theory of change and logical framework

Please find below the political level representatives having represented each Member State during the Opening remark:

1. Deputy Minister for Labor and Social Affairs, responsible for demography and family policies and gender equality: Maria Syrengela representing Greece (kick off held online the 19<sup>th</sup> of September 2022).
2. Deputy Mayor in charge of gender equality: Christelle Wieder representing the City of Strasbourg (kick off held physically the 20<sup>th</sup> of September 2022)
3. Mrs. Diana Elena Neaga, counsellor to the Minister for Equal Opportunities Between Women and Men representing Romania (kick off held online the 26<sup>th</sup> of September 2022)
4. Madam Secretary of State for Higher Education, Research and Gender Equality, Dr. Eva Gumbel, representing the lander of Hamburg (kick off held online the 6<sup>th</sup> of October 2022)
5. Madam Secretary of State for the Ministry of Labour, Social Affairs, Health and Equality, Mrs Susi Möbbeck, representing the lander of Sachsen Anhalt (kick off held online the 6<sup>th</sup> of October 2022)
6. Madam Secretary of State for Higher Education, Research and Gender Equality, Mrs Armaghan Naghipour, representing the lander of Berlin (kick off held online the 6<sup>th</sup> of October 2022)
7. The last kick off meeting, for the Irish administration, took place the 12<sup>th</sup> of December 2022. A recorded message from the Minister for Children, Equality, Disability, Integration and Youth Mr O’ Gorman introduced the event.

For the Italian beneficiary, considering their different nature of participation in the project, it was decided to organize a kick off in a later period in order to combine both European projects.

### **3.3 Activity A.1.1. Opening conference of presentation of current practices, processes and procedures**

From the 10<sup>th</sup> to the 12<sup>th</sup> of October 2022, an Opening Conference has been organized in partnership with the European University Institute in Fiesole (Italy).

The three-day Opening Conference is the first formal activity of the “Gender mainstreaming in public policy and budgeting” Project. The conference has consisted of opening and closing plenary sessions, interactive thematic sessions, a series of discussions and workshops on the importance of policies tackling gender inequalities, and presentation of current practices and procedures, needs and challenges for mainstreaming gender at European level and beyond.

A first panel has presented the historical background of the implementation of gender mainstreaming (GM) approaches in Europe and worldwide since the Fourth World Conference on Women held in Beijing in 1995. Panellists have described the results of almost thirty years of implementation of gender mainstreaming approaches, showing which are the missing pieces and why, still today, it remains a challenge.

In particular, the emerging inequality issues as the result of Covid-19, yet represent a wide-across challenge for any government and administration to cope with high demand for services and financing the inequality gap.

Two working groups have been organized the second day in order to tackle gender responsiveness of the national recovery and resilience plans (NRRP), gender data gaps, and the advocacy needed to support gender responsive actions. Hence, the purpose of the work in groups was to bring inequality issues in the attention of administration and discuss about. Acknowledging the challenges ahead is one key gain for any administration, a prerequisite for effective gender responsive measures.

The second panel was meant to present the role of external actors have in raising the awareness on gender equality issues. It is in the intention of this panel to bring in best practices on gender mainstreaming outside public administration, an eye-open effort to help recognize potential allies authorities can rely on in order to push the gender equality agenda at the national level. Private sector, feminist movements, international and European organizations are essential stakeholders for the implementation of gender mainstreaming.

The third panel focused on best practices by putting an emphasis on GRB and GIA, both effective tools and approaches to advance the gender equality agenda of the project beneficiaries. Best practices from Canada, from the Junta de Andalucia, (Spain) from France and from the Eurosocal programme have been presented by local policy officers.

33 participants (out of 36 forecasted) from the 9 beneficiary authorities have participated in the Conference.

An entry survey has been sent to participants in order to get their initial knowledge of GM, GRB and GIA and their expectations concerning the general trainings – planned in 2023.

Panellists from EU institutions (Alexandra Geese, Bernard Windisich, Marusa Gortnar) and academia (Johanna Kantola, Tindara Addabbo, Tommaso Nannicini) have been invited to share their critical view on gender equality policies and implementation.



### **3.4 Activity A.1.2. General trainings**

The second activity (A.1.2) of the introductory phase of the project is the organization of two series of virtual (in distance) trainings on GRB and GIA tools.

Those trainings aim at increasing the awareness and strengthening the knowledge of the key persons in the participating administrations on gender mainstreaming tools such as GRB and GIA. The aim is to deepen the understanding of GM tools further from the Opening Conference introductions, while not yet deep diving into the key national points of emphasis. The idea would be to provide a chance to beneficiary authorities to bring key stakeholders to grasp the main concepts of Gender Mainstreaming.

This activity will be implemented in partnership with the European University Institute, with the participation of EIGE as consultant and quality controller, when feasible.

Beneficiary authorities will be divided into two groups in order for trainees to work with a smaller group and increase the efficiency of the tailored support. Each beneficiary authority will be participating with four participants. Depending on the demand and participation of beneficiary authorities, a second round of trainings may be organized.

Public servants from the beneficiary authorities in the Member States will be trained by international experts. They will benefit from the pedagogic material developed by EIGE and the EUI with the support of local and long-term experts from Expertise France.

Each general training will last 15 hours (5 sessions of 3 hours). They will be starting the 17<sup>th</sup> of January until the 13<sup>th</sup> of April. The beginning of the general trainings has been delayed from November 2022 to January 2023 upon request of beneficiary authorities.

Below, the final schedule of GRB and GIA virtual trainings.

	<b>Gender responsive budgeting training</b>		<b>Gender impact assessment training</b>	
	<b>Group 1 (Tuesday)_ 14h-17h (CET)</b>	<b>Group 2 (Thursday)_ 14h-17h (CET)</b>	<b>Group 1 (Tuesday)_ 14h-17h (CET)</b>	<b>Group 2 (Thursday)_ 14h-17h (CET)</b>
1	17-Jan	19-Jan	14-Mar	16-Mar
2	24-Jan	26-Jan	21-Mar	23-Mar
3	07-Feb	09-Feb	28-Mar	30-Mar
4	14-Feb	16-Feb	04-Apr	06-Apr
5	21-Feb	23-Feb	11-Apr	13-Apr

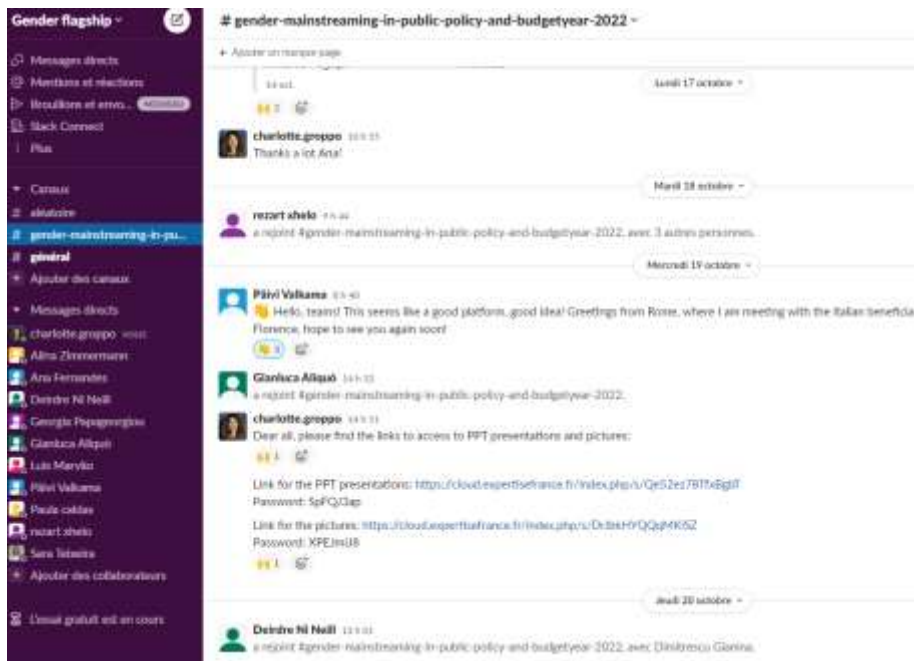
In the annex (Annex 11.5) there is a detailed description of the GRB training. The GIA training is still under construction. Its description will be further communicated.

## 4. INTERNAL AND EXTERNAL COMMUNICATION

Considering the importance of creating an enabling environment to promote gender equal policies, internal and external communication of the project will be a key aspect of success.

### 4.1 Internal communication

In order to enable direct communication and exchange between beneficiary authorities, a Slack platform has been created. This platform is quite useful and allows participants post questions, post key resource materials and information. In addition to the Slack chat, a cloud was provided to share documents. For instance, all materials and presentations of the Opening Conference are provided and accessible in the cloud.



### 4.2 Visual identity

In order to communicate on the project, a visual identity has been created. In addition to the logo, other promotional materials have been realised by a designer such as leaflets, roll ups and small items to send out to Opening conference participants.



# GENDER FLAGSHIP



## 4.3 Social media communication

A dedicated project webpage translated in French and English has been created within Expertise France's website: <https://www.expertisefrance.fr/en/fiche-projet?id=876698>

To broaden communication channels, the choice was made to concentrate the communication about the project on Twitter and LinkedIn platforms.

During the Opening conference, first event gathering all beneficiaries, several posts have been produced by Expertise France, DG reform and EUI either on LinkedIn and Twitter. The replay of the event is also available on the Expertise France YouTube channel: [https://www.youtube.com/watch?v=ZCSwkb0FNbc&list=PLvF4HpzmsrL60TUPiKIs0-VMb\\_VatOQR](https://www.youtube.com/watch?v=ZCSwkb0FNbc&list=PLvF4HpzmsrL60TUPiKIs0-VMb_VatOQR)



The DG reform has also created a dedicated webpage: [https://reform-support.ec.europa.eu/gender-mainstreaming-public-policy-and-budget-processes\\_en](https://reform-support.ec.europa.eu/gender-mainstreaming-public-policy-and-budget-processes_en) and communicated through its press release on the Opening conference event.

EUI has also published an article on their news page: <https://www.eui.eu/news-hub?id=the-eui-and-expertise-france-supporting-gender-equality-in-7-eu-member-states>

Dedicated articles have been also published by beneficiary authorities (for example Portugal: <https://www.cig.gov.pt/2022/10/cig-representa-portugal-na-conferencia-de-abertura-do-projeto-gender-mainstreaming-in-public-policy-and-budgeting/> ) and local feminist magazines (50-50 magazine: <https://www.50-50magazine.fr/2022/10/27/charlotte-groppo-lapproche-par-le-genre-doit-etre-accompagnee-renforcee-soutenue/> ).

## **5. NEXT ACTIVITIES IN 2022 AND BEGINNING 2023**

### **5.1 In-depth analysis (A.1.3)**

Starting from October 2022, local experts and the project team will focus on the first individual activity for each beneficiary: the in-depth analysis.

A guideline document has been prepared by the long-term expert (see it in attachment (Annex x.)) in order to support local experts and authorities with a comprehensive process and focused gender analysis. Each gender analysis will be used as a basis for a tailored action plan (activity A.1.4)

By February 2023 each beneficiary authority is expected to be presented with the main results of the in-depth analysis and subsequently, the action plans for the rest of the project duration.

### **5.2 Workshop 1 in Lisbon, Portugal**

After the end of the two general trainings on GRB and GIA, a first workshop is going to take place in Lisbon, Portugal on gender responsive budgeting. All beneficiary authorities will be invited to participate.

Based on the tailored action plans, the two-day workshop will gather all beneficiary authorities in order to deepen their knowledge and use of budgetary processes and their analysis on gender equality. The focus is on core departments, responsible for gender equality and public finance management. For this activity, the other implementation partners such as the EUI and EIGE will be participating as trainees.

The approximate dates are the 18<sup>th</sup> and 19<sup>th</sup> of April 2023.

### **5.3 Workshop 2 in Athens, Greece**

The second residential workshop that will be organized in partnership with EUI and EIGE is going to take place in Athens, Greece in June 2023. All beneficiary authorities will be attending as for the first workshop. It will focus mainly on gender impact assessment and gender evaluation indicators. Yet again the focus is to build capacities of administration and partner institutions responsible to advance the gender equality agenda in member states.

According to the technical offer, other common activities will be organized in 2023-2024. For instance, 2 study visits (ideally one in Austria and the other one in the Junta de Andalucia) and a third workshop based on the pilot projects implemented by Member states.

## 6. UPDATED INDICATIVE TIMELINE

The starting date of the project was the 15th of June, a month later than expected by the technical offer. This short delay implicates a change in the original timeframe.

Each activity has been delayed for one month. Other changes have already been made in order to adapt to beneficiary authorities' requests.

1. Virtual general trainings will be starting in January 2023 instead of November 2022.
2. Instead of having the three workshops and the two study visits in 2023, the third workshop and the second study visit have been moved to 2024.

GENDER MAINSTREAMING IN PUBLIC POLICY AND BUDGETING																												
ACTIVITES	2022							2023													2024							
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28
<b>Opening Phase</b>																												
Kick off meeting																												
Analyses of the requests, adaptation of the activities and development of a plan for M&E																												
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A.1.1. Opening conference of presentation of current practices, processes and procedures																												
A.1.2. Organisation of general trainings																												
<b>Implementation Phase</b>																												
C1: Elaboration of action plans: Analysing the practices and confirming specific needs of each beneficiary authority in order to strengthen the integration of GM, through the application of tools of GB, GAPs or of GIA																												
A.1.3. In depth analysis of practices and needs for each beneficiary authority																												
A.1.4. For each beneficiary authority: restitution of the outcomes of the in depth analysis and detailed development of the action plan linked to the initial request																												
C2: Operationalisation: Building capacities and implementing tools for GB, GAPs or GIA at the level of each beneficiary authority in application of elaborated action plans																												
A.2.1. Organisation of 3 Workshops for general training gathering beneficiaries with similar characteristics and needs identified																												
A.2.2. Tailored and specific accompaniment for each beneficiary																												
A.2.3. Organisation of study visits or Civil Servant Exchange followed by a																												
C3 : Capitalisation: Embedding the new practices and enabling their duplication across institutions.																												
A.3.1. Support for the creation of tailored methodological guides and tools																												
A.3.2. Support for the development of the good practices at national level, fostering dissemination																												
<b>Closing Phase</b>																												
A.3.3. Seminar of sharing of experience and publication of the results online																												

## 7. MONITORING & EVALUATION

Internal Monitoring and Evaluation expertise has been mobilized in order to elaborate a M&E plan for the total duration of the project.

The logical framework and the theory of change have been finalised. However, considering that each beneficiary authority's request differs from one to another, these initial documents would be adapted to better fit local contexts.

The theory of change has been presented during kick off meetings. Logical framework will be discussed and approved by the first National steering committee that will be held before the end of 2022.

The schedule of the National Steering Committees (NSC) are under discussion with beneficiary authorities.

By the end of 2022, six NSC will be organized by the project team (the German landers will be participating in a unique NSC and no NSC for Italy is planned considering their participation only to group activities) gathering DG Reform representatives, beneficiary authority representatives and Expertise France.

## 8. EXPERT AND PROJECT TEAM

According to the technical offer and to meet countries' requests, the Project team had worked on the division of expertise days per activity and per beneficiary country.

Three different types of expertise will be mobilized:

1. Long-term expertise: 3 experts have been recruited by Expertise France in order to implement the project.
  - a. The Key Gender expert/Head of project: Charlotte GROPPPO. She has been contracted for the entire duration of the project. She provides the project with technical expertise, coordinates the definition of the activities for each beneficiary and is responsible for the overall supervision and coordination of the project in order to ensure consistent support of the beneficiaries.
  - b. The Key Gender budgeting expert: Rezart XHELO. He has been contracted for the entire duration of the project. He is responsible for the coordination of the expertise and for providing the technical support to the beneficiaries.
  - c. Internal expertise. They are not part of the project team, but they are mobilized to for specific tasks such as work on monitoring and evaluation, quality review of the project deliverables, identification of expertise, etc. Depending on the requests of the beneficiary, internal expertise on Public Procurement might be mobilised.

2. Local expertise: 1 or 2 experts per beneficiary authority, familiar with the local context and actors, are mobilized for the tailored support and implementation of individual activities for the entire duration of the activity.

Main tasks:

- Support the coordination of activities at the national level, in conjunction with the Head of Project and Key Expert on Gender Budgeting;
- Ensure technical support to beneficiaries in developing a sector-wide approach for GAP implementation taking into considerations: gender policy, institutional mechanism, programs and procedures;
- Meet and consult regularly with beneficiary authority and national partners;
- Support the adjustment of activities to national specificities;
- Assist the project team to review and refine gender related assistance and prepare a detailed implementation plan to align beneficiary needs and priorities with project outcomes;
- Inform the project team on national developments and the implementation of activities;
- Facilitate the organisation of activities at national level (researches, meetings, seminars, missions, etc.);
- Assist with identification baseline data needs, identify risks and measure to address them, and ensure collection of sex-disaggregated data;
- Prepare periodic technical assistance reports (monthly or quarterly) documenting lessons learned and successful approaches in the course of project implementation.

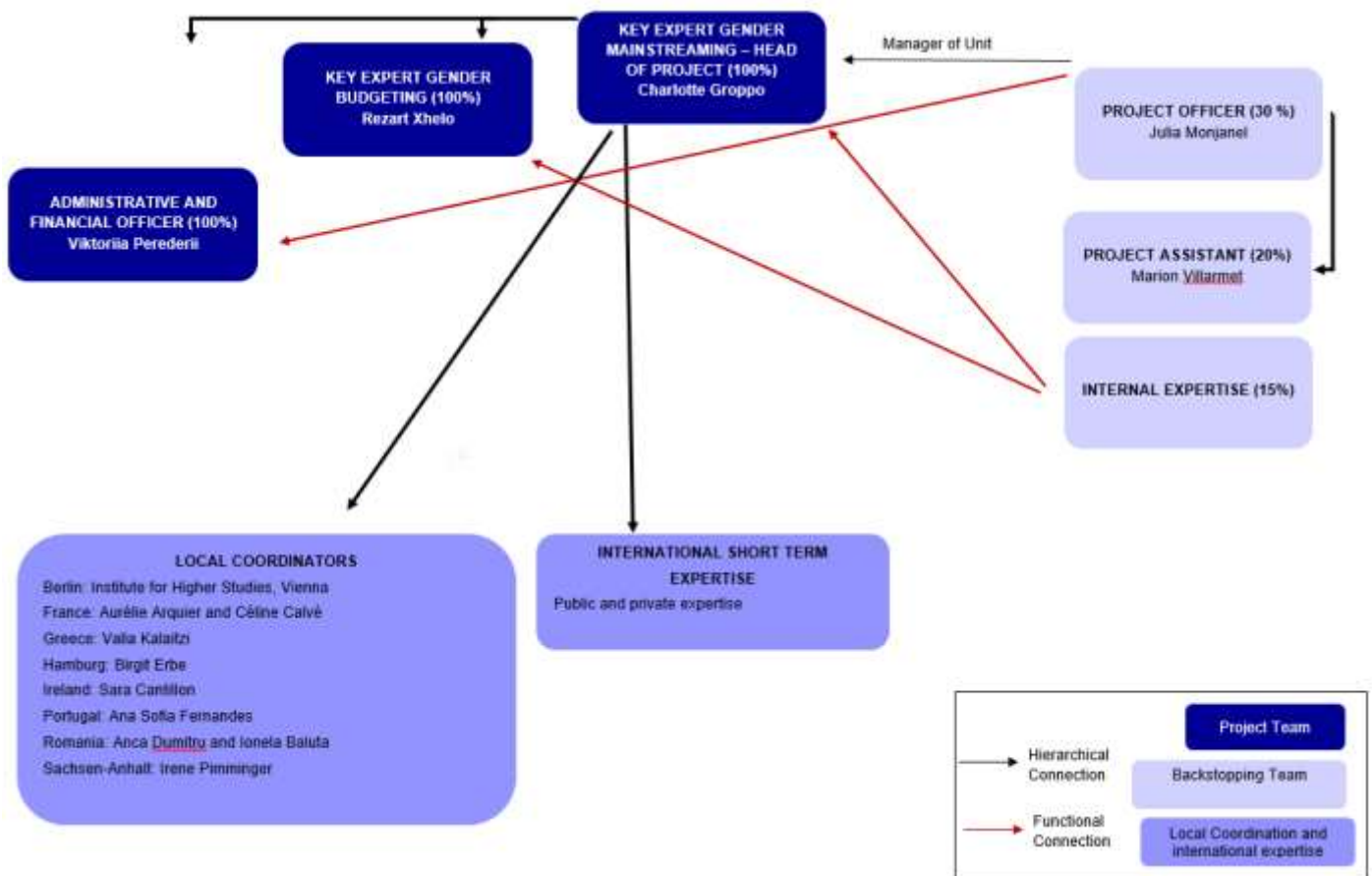
3. Short-term expertise: International short-term expertise will be mobilized to support beneficiary authorities and the local expertise in specific activities and trainings. A roster of gender mainstreaming experts has been created by Expertise France for this purpose. Experts such as Giovanna Badalassi or Elisabeth Klatzer will be mobilized during the tailored support phase. Other short-term experts could be mobilized to support beneficiary authorities on public budgeting; evaluation or gender data.

In addition to the international private expertise, the Project team will mobilize public experts from EU and non-EU member states in order to foster peer-to-peer exchange and implementation of international best practices (such as Thomas Caltagirone, Alicia del Olmo, Trinish Padayachee or Mar Merita Blat).

The project implementation is also supported by a backstopping team composed of two persons:

- The project officer is working on ensuring the respect of contractual obligations of the subvention and of EF norms and procedures, on quality review and validation of reports and deliverables and on capitalisation of the action.
- The project assistant is supporting the logistical, financial and administrative follow-up of the project, especially in period of high level of activity.

**Organigram of the project:**



## 9. PARTNERS

According to the technical offer, two implementation partners have been selected by Expertise France and DG Reform: the European Institute for Gender Equality (EIGE) and the European University Institute (EUI). However, considering OECD expertise on Gender budgeting, Expertise France is under discussion with the OECD in order to find a partnership agreement.

EUI and EIGE partners have different contract agreements with the Project team. While EIGE signed a letter of agreement directly with the DG Reform, EUI signed a contract with Expertise France as a sub-contractor.

## **10.1 EIGE**

The exchange of letters between EIGE and the DG Reform<sup>2</sup>, signed the 4<sup>th</sup> of November 2022, details the implication of the EIGE in the project. On one hand, EIGE will be invited to share its materials (toolkits and methodologies) in order to be adapted to beneficiary authorities.

On the other hand, materials developed within the project by local experts will be made available for EIGE, to be further utilized and elaborated, for example, toolkits and guides that can be adapted to include all EU Member states.

Depending on the results, EIGE will support the use and dissemination of the tools in the framework of its 2025 project on gender budgeting.

EIGE experts will be participating in general trainings and residential workshops in order to share their expertise and know-how with beneficiary authorities.

## **10.2 EUI**

The agreement between Expertise France and EUI was signed mid-September and includes:

- The organization of the opening conference by presenting current practices, processes and procedures of GM through GRB and/or GIA (activity 1.1): a three-day Opening Conference consisted of a series of discussions and workshops on the importance of policies tackling gender inequalities, and a presentation of current practices and procedures, needs and challenges for mainstreaming gender at European level and beyond.
- Two general trainings of 15 hours each on GRB and GIA (activity 1.2): By allocating 15-hours to each module (divided in 5 sessions of 3 hours), there is ample time to dedicate both to theory and practice. Case studies will be used, also by tapping into the direct experience of and challenges faced by the participants themselves. The EUI will engage trainers and facilitators with expertise on these topics as well as ample experience in delivering training to adults – thus with knowledge of the type of engagement necessary in adult education.
- Two residential seminars (activity 2.1): on the basis of the analysis of practices and needs for each beneficiary authority and the support in the application of the Action Plans done by Expertise France project team and experts, residential workshops will be organised so as to gather beneficiaries with similar needs and experiences and give them an avenue for peer-exchange as well as for learning and consolidating GM practices.
- International short-term expertise that can be mobilized during the operationalization phase of the project

## **10.3 OECD**

Considering OECD long experience in supporting national administration in implementing gender responsive budgeting, the Project team and DG Reform agreed in finding a way for the OECD to collaborate on the project.

However, due to legal complications on the type of agreement, Expertise France and OECD have not yet agreed on the implication of the OECD. Discussions are ongoing between parties.

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<sup>2</sup> Reply to the Request for EIGE support for implementation of project TSI2022 (TSI2022/MCP/146) - Gender mainstreaming in public policy and budget processes

Assigned by : ve\_reform.b.1(REFORM.B.1) on 04/11/2022

Registration number: Ares(2022)7622994 created on 04/11/2022

## 10. ANNEXES

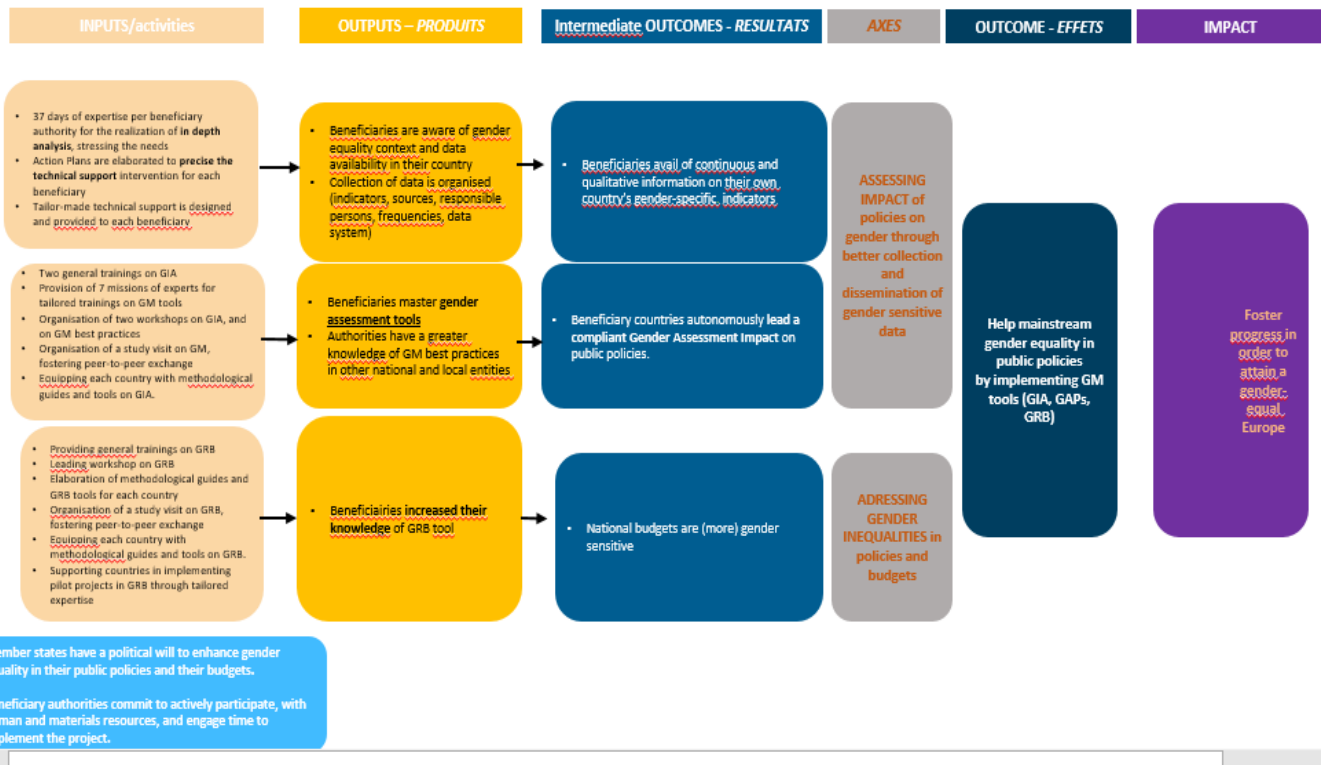
### 11.1 Agenda of the Opening Conference

Day 1	Monday, October 10th
13:30	Arrival of participants
14:00	Welcoming remarks from Ruth Rubio, Professor and Head of the Gender Cluster EUI School of Transnational Governance (EUI)
14:05	<u>Opening remarks</u> <ul style="list-style-type: none"> <li>▪ Mario Nava, Director General, DG Reform</li> <li>▪ Jérémie Pellet, General Director, Expertise France</li> </ul>
14:15	Floor to the beneficiaries <ul style="list-style-type: none"> <li>▪ member states and <i>Laender</i></li> </ul>
15:15-15:45	Ice breaking activity
15:45– 16:00	Framework of the conference and organization of working days <ul style="list-style-type: none"> <li>▪ Costanza Hermanin (EUI) &amp; Charlotte GROPPPO (Expertise France)</li> </ul>
16:00- 16:30	Coffee break
16:30 – 18:00	<b>1<sup>st</sup> panel: <i>From the Beijing platform for action (1995) to the Generation Equality forum (2021), why Gender mainstreaming is still a challenge?</i></b> <ul style="list-style-type: none"> <li>▪ Gender inequality in Europe and worldwide: facts and figures <b>Marusa Gortnar</b>, Head of Operations, EIGE</li> <li>▪ Gender mainstreaming from the 1990s to our days: what are the missing pieces? <b>Johanna Kantola</b>, Professor of Gender Studies at the Faculty of Social Sciences, Tampere University, Finland</li> <li>▪ The impact of COVID19 on gender-based inequality, <b>Tommaso Nannicini</b>, Full Professor of Political Economy, Università Bocconi;</li> <li>▪ The European Parliament and the new EU gender budgeting obligations <b>Alexandra Geese</b>, MEP Greens-EFA, in charge of gender budgeting in the BUDG committee</li> </ul> <p>Q&amp;A</p> <p>Moderators: Costanza Hermanin &amp; Charlotte Groppo</p>
19h30	Aperitivo - stand up light dinner
Day 2	Tuesday, October 11 <sup>th</sup> 2022
9:00- 9:30	Presentation of the daily agenda and arrival of participants
9:30-11:00	<i>Working groups</i> <b>WG1</b> Gender evaluation for National Recovery and Resilience Plans and EU funds, <b>Tindara Addabbo</b> , Full Professor of Economic Policy, University of Modena & Reggio Emilia <b>WG2</b> How do we look for gender sensitive data? <b>Valentina Bazzarin</b> , Thinktank Period <b>WG3</b> How to advocate for equality within an administration? <b>Rezart Xhelo</b> , Expertise France
11:00-11:30	Coffee break

<b>11:30- 12:00</b>	Restitution of working groups + Q&A
<b>12:00-13:30</b>	Lunch break
<b>13:30- 14h</b>	Best practice on GBA+ and GRB, <b>Trinish Padayachee</b> , Lead gender Budgeting, Government of Canada
<b>14:00-15:30</b>	<p>2<sup>nd</sup> panel: <i>New allies? Actors to rely on for the promotion of a gender equality agenda</i></p> <p>Moderators: Costanza Hermanin &amp; Charlotte Groppo</p> <ul style="list-style-type: none"> <li>▪ The role of the EU for an ambitious agenda: the new Commission's gender-tracking methodology' <b>Bernhard Windisch</b>, Head of Unit Budget performance &amp; policy mainstreaming, DG BUDGET</li> <li>▪ The private sector and gender mainstreaming: from gender procurement to virtuous examples, <b>Céline Bonnaire</b>, Executive Director, Kering Foundation</li> <li>▪ Feminist movements and Gender mainstreaming: the role of advocacy, <b>Justine Okolodkoff</b>, Head of the advocacy, Règles élémentaires</li> <li>▪ Q&amp;A</li> </ul>
<b>15:30-16:00</b>	Coffee break
<b>16:00-17:30</b>	<i>How much do we know about gender mainstreaming and gender responsive budgeting? Working groups</i>
	<p>WG1 Gender sensitive indicators: What are the current challenges (institutional, societal)? <b>Valentina Bazzarin</b>, Thinktank period</p> <p>WG2 Gender Responsive Budgeting (GRB): Definition and tools for effective GRB <b>Tindara Addabbo</b>, Full Professor of Economic Policy, University of Modena &amp; Reggio Emilia</p> <p>WG3 Gender Impact Assessment <b>Rezart Xhelo</b>, Expertise France</p>
<b>17:30-18:00</b>	Restitution of working groups + Q&A
<b>20:30</b>	Dinner
<b>Day 3</b>	<b>Wednesday, October 12th</b>
<b>9:30- 11:00</b>	<p><i>The world tour of gender mainstreaming best practices</i></p> <ol style="list-style-type: none"> <li>1. Best practice on GRB : <b>Alicia del Olmo Garrudo</b>, Jefa de Proyecto, Programa de Presupuesto y Género (Junta de Andalucía)</li> <li>2. Best practice on GM, <b>Alfonso Martinez</b> (Eurosocial Help desk on Gender mainstreaming)</li> <li>3. Best practice on gender tagging: <b>Thomas CALTAGIRONE</b>, deputy chief of the Performance and budget unit, France</li> </ol>
<b>11:00-11:30</b>	Coffee break
<b>11:30-12:00</b>	Keynote: <i>Academia and gender equality: building a bridge in between know-how and decision-making. Why does public administration need to rely on academia as an ally?</i> <b>Costanza Hermanin</b> , EUI
<b>12:00- 12:30</b>	Wrap up and closing remarks
<b>12:30</b>	Lunch break



## 11.2 Theory of change



## 11.3 Logical framework

(Annex 1 Logical framework)

## 11.4 Guidance for the in-depth analysis

(Annex 2 Guidance for the in-depth analysis)

## 11.5 GRB general training sessions

<p align="center"><b>GENDER RESPONSIVE BUDGETING</b> <b>SESSION 1 (3H TRAINER 1)</b></p>	
	<p align="center"><b>Gender Mainstreaming as a Tool: Principle, Theory and Prospects</b></p>
<p><b>Topic description</b></p>	<p>This introductory session outlines the definition of gender mainstreaming and the relevance of mainstreaming gender in the policy process as a contribution to enhancing the effectiveness of public policy overall and reducing inequalities specifically. It outlines the principles of gender analysis of policy making and looks at the evolution of gender mainstreaming within EU policy documents, from the EU Gender Equality Strategy 2020-2025 and the Gender Action Plan (III) to requirements within programs related to the structural funds and Next Generation EU. Trainer and participants will discuss innovations, new obligations to be expected in the near future, and methods to advocate for a stronger engagement of public institutions in favour of gender equality.</p>

<b>Interaction and exercises</b>	The session will feature a round of introductions during which participants will communicate their fields of expertise, level of knowledge of the topic, needs and expectations. It will include one/two rounds of exercises based on case studies proposed by the trainer. The trainer will also assess to what extent participants are able or willing to prepare in advance with readings and /or preparing situations to be worked upon in class. Accordingly (s)he will request participants to apply a mainstreaming approach to examples of their choice and to file them with the trainer before session no. 2.
<b>SESSION 2 (3H TRAINER 2)</b>	
	<b>Gender Budgeting and Gender Sensitive Analysis of Expenditures</b>
<b>Topic description</b>	This session introduces the principles of gender economics and the process of engendering macroeconomics, spending and fiscal policy. It focuses on how to understand the relevance of specific spending/fiscal policies vis-à-vis gender equality and vice-versa. It introduces the main methodologies used to track expenditures, and (e.g. OECD DAC, Commission tracking system, other national approaches) and three main methods of analysis, relying on concrete examples and selecting case studies among those filed by participants.
<b>Interaction and exercises</b>	Case studies are drawn from the examples selected and filed by the participants after session 1. During the session and under the guidance of the trainers, participants will work individually and in groups on the preliminary budgeting aspects of their case studies. After the session, they are asked to submit the result of their work to the trainer.
<b>SESSION 3 (WEEK 3, 3H TRAINER 2)</b>	
	<b>Engendering Policymaking: Stakeholder Identification and GRB components</b>
<b>Topic description</b>	What is the information relevant to deliver gender analyses of budgets and gender auditing? The trainer will explain how to identify all the stakeholders relevant to gender-sensitive budgeting. The trainer will also explain how to distinguish in between input, output, and outcome within the spending cycle. Finally, the session introduces the do no harm principle related to gender equality.
<b>Interaction and exercises</b>	Prior to this session, participants must identify a second examples from their daily work to which they will be asked to apply, in class, a GRB approach. In particular, the trainer will ask them to work in groups to deliver a stakeholder map, input, output, and outcome effects of the programme under analysis and possible negative externalities. Q & A and peer review and exchange are also encouraged, paying special attention to across policy areas (how actors in one field may influence another and vice-versa).
<b>SESSION 4 (3H TRAINER 3)</b>	
	<b>Disaggregated data and data gaps: limits and opportunities</b>

<b>Topic description</b>	Data disaggregated by gender are not always readily available. This session outlines the main databases available for context analysis and points to possible sources of disaggregated data at various level of governance. At a second level, the session outlines the data that are necessary to compile gender budgets and perform gender reclassification. The trainer will ask participants to identify data gaps within their administrative contexts, possible sources of data and the institutions holding them. Finally, the trainer will help participants think of proxies to be used in the absence of data and present tools for the release of disaggregated data. The session will also address data protection concerns.
<b>Interaction and exercises</b>	Prior to the session, participants are asked to identify the sources of data disaggregated by gender that are necessary for their daily work. During the session and under the guidance of the trainers, participants will work in groups to identify data gaps and devise strategies to obtain the data needed to develop gender budgets. Results are discussed and presented during the class.
<b>SESSION 5 (WEEK 4 TRAINER 2)</b>	
<b>Tracking, scoring, negotiating, improving and reclassifying</b>	
<b>Topic description</b>	The session outlines the principles and methods of gender auditing and reclassification of budgets, as well as gender procurement guidelines. It presents practical examples and then engages participants in the application of the tools and methodologies presented throughout the course.
<b>Interaction and exercises</b>	Based on the cases worked upon in session 2 and 3, in this session half of the participants engage in the cases as granting / tendering authorities and the other half simulate the role of contracting / beneficiary entities. Each group engages in a negotiation around the gender relevance of each programme. The trainer intervenes in the negotiation process to guide the discussion and clarify /reply to questions. In a second moment, participants finalize a complete GRB analysis of one of the cases they have been working on, including proposing a reclassification of expenditures. Participants are expected to simulate completing their work in adherence with actual principles and processes for gender budgeting set out in EU hard and soft law.