

## The Gender Equality Policy Marker within EuropeAid

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### 1. Introduction

The OECD/DAC introduced the Gender Equality Policy Marker (G-marker) in 1997 with the aim to facilitate monitoring and co-ordination of DAC Member's activities in support of gender equality. Because several aid agencies faced difficulties in applying the G-marker, the DAC Network on Gender Equality (GENDERNET) made suggestions for the clarification of its definition in order to improve the marker and its application (OECD/DAC, 2006). As a result, in the present Reporting Directives for the Creditor Reporting System it is defined that "an activity should be classified as gender equality focused (score 'Principal' or 'Significant') if it is intended to advance gender equality and women's empowerment or reduce discrimination and inequalities based on sex" (OECD/DAC, 2008a: 4). Criteria for eligibility are: gender equality is explicitly promoted in activity documentation through specific measures which (a) reduce social, economic or political power inequalities between women and men, girls and boys, ensure that women benefit equally with men from the activity, or compensate for past discrimination; or (b) develop or strengthen gender equality or anti-discrimination policies, legislation or institutions (OECD/DAC, 2008a:4).

Three different values are used in the marking system: 'principal objective' (G-2); 'significant objective' (G-1) or 'not targeted to the policy objective' (G-0). Principal policy objectives are those which can be identified as being fundamental in the design and impact of the activity and which are an explicit objective of the activity. Significant policy objectives are those which, although important, are not one of the principal reasons for undertaking the activity. Not targeted to the policy objective means that the activity has been screened against, but was found not be targeted to, the policy objective (OECD/DAC, 2008a: 2).

In 2007, 2008 and 2009 the OECD/DAC reported on the expenditures of the DAC members on activities with a principal objective of gender equality (G-2) and activities with a significant objective of gender equality (G-1). Almost all of the sector-allocable aid of the European Commission (EC) (95.7 in 2004, 100 in 2005, 92.1 in 2006 and 98.8 in 2007) was screened against the G-marker. Table 1 presents the absolute and relative importance of G-1 and G-2 activities within the EC.

Table 1: Absolute and relative importance of G-1 and G-2 activities within the EC

	2004		2005		2006		2007	
	€ million	% of aid screened	€ million	% of aid screened	€ million	% of aid screened	€ million	% of aid screened
<b>G-1</b>	1.136	18.1	894	11.4	3.252	38.4	2.069	21.4
<b>G-2</b>	69	1.1	30	0.4	136	1.6	187	1.9
<b>Total</b>	<b>1.205</b>	<b>19.2</b>	<b>924</b>	<b>11.8</b>	<b>3.388</b>	<b>40.0</b>	<b>2.256</b>	<b>23.0</b>

Source: OECD/DAC, 2007a, 2008b and 2009a

The table demonstrates that only a small percentage of EC aid activities has gender equality as a principal objective, but their expenditures have increased steadily (in absolute terms as well as in relative terms) since 2005. It further highlights that the G-1 expenditures show more fluctuation (in absolute and relative terms).

In the beginning of 2009 EuropeAid assessed the quality of the application of the G-marker to their 2008 projects. In 2008 90.6% (575 out of 635) of the 2008 projects were marked with

the G-marker. The results of the assessment show that the quality of the application is very poor (see table 2).

Table 2: The quality of the application of the G-marker to the 2008 projects (%).

	<b>G-2</b>	<b>G-1</b>	<b>G-0</b>
<b>Well marked</b>	69.2	28.2	54.3
<b>Badly marked</b>	30.8	46.5	17.1
<b>Missing documents</b>	0.0	25.3	28.6

Source: EuropeAid, 2009

It seems especially difficult to apply the G-1 score. According to the report of the assessment, officers who are in charge of the application of the G-marker are inclined to give a G-1 mark to projects that only have gender equality mentioned in a paragraph on all cross-cutting issues or have women included in the beneficiaries of the project. Therefore the report recommends that projects can only be marked with a G-1 score when gender equality is a significant objective “translated in the form of one of the project components or of gender-specific indicators related to the project objectives” (EuropeAid, 2009:2). If gender equality is not linked to any objective or result indicator the project should be marked G-0 (EuropeAid, 2009).

Partly as a result of this assessment, EuropeAid asked IOB to elaborate a short paper with the following elements:

- A short overview on how other donors are applying the G-marker.
- A short paper on how the G-marker can be applied to general budget support.
- A short and clear instruction (one page), or a check-list with some key questions, to facilitate a more objective application of the G-marker by the EC staff.

Chapter two deals with the first element, chapter three with the second element and chapter four gives a short overview of the usefulness of the G-marker. The one-pager is provided in the annex.

## **2. The application of the G-marker by other donors**

In January 2008 GENDERNET and the United Nations’ Inter-Agency Network on Women and Gender Equality (IANWGE) organised their joint biennial workshop on ‘enhancing partnerships between multilateral and bilateral agencies to support partner country efforts to achieve gender equality and women’s empowerment’. The second session was on ‘measuring and tracking gender equality focused aid- what we already know and what is possible’. In this session Germany was put forward as an example where the use of the G-marker has been harmonised between the BMZ and the implementing agencies (OECD/DAC, 2008c). Besides Germany, other good examples of the application of the G-marker were not found. Therefore, this paragraph will elaborate also on two examples of other initiatives, Denmark and Canada. Denmark was showcased in the session in the biennial workshop as an example of a country that undertook the initiative to track gender-related investments and expenditures (OECD/DAC, 2008c)<sup>1</sup>. In Canada, the Canadian International Development Agency (CIDA) developed a framework for assessing gender equality results.

### *Germany:*

In 2001 the Federal Ministry for Economic Cooperation and Development (BMZ) obliged the application of the G-marker to all projects and programmes of German development cooperation. Because the criteria for applying the G-marker were interpreted differently by

<sup>1</sup> Besides this initiative, Denmark is applying the G-Marker as well. In 2005, 2006 and 2007 all activities have been screened against the G-Marker (OECD/DAC, 2008b and 2009a).

actors within German development cooperation, the German bilateral development agencies (GTZ, KfW and BMZ) decided to define new criteria with the aim to create a common understanding of the practical application of G-markers within German implementing organisations. These new criteria are formulated in a more results-oriented manner, as the G-markers will be used as benchmark for assessing the impact of projects and programmes on gender equality and the empowerment of women (GTZ et al, 2006). While the OECD/DAC formulates joint criteria for eligibility of G-2 or G-1, the German bilateral development agencies developed criteria specifically for G-2, G-1 as well as for G-0. Besides, general criteria are defined which apply to all development interventions.

General criteria are:

- All development interventions must aim to achieve a systematic impact on gender equality, rather than merely striving for target group participation.
- When preparing development interventions, a gender-specific analysis is to be conducted.
- Well-founded reasons for the assigned score on the G-marker must be given for all development interventions.
- In financial and technical cooperative projects, joint funding and programme approaches, the development intervention as a whole (cooperative project or programme) should be assessed (GTZ et al, 2006: 9).

Criteria for G-2 marker:

- The development intervention is consistent with, and supportive of, the national gender strategy and the gender-relevant aspects of other national development strategies outlined by the cooperation country (e.g. PRSPs).
- The development measure is geared towards making a significant contribution to reducing gender-specific disadvantages.
- The development intervention serves to directly improve the living conditions of men or women who are disadvantaged as a result of their gender. In addition to this, it aims to trigger societal change processes to encourage greater equality between women and men. Direct structural impacts on gender equality are clearly defined and plausibly described using results chains. This process is then backed up with specific indicators. If this is not possible, the intervention should be classed as G-1.
- Women and men can exert an influence on the planning and implementation of the development intervention in line with their interests. Methods to ensure this happens are set out in the concept of the development intervention.
- Gender equality is fully integrated within the development intervention. It is a central part of the indicators and influences the allocation of financial and human resources, as well as the activities that are planned as part of the development intervention.
- Progress towards realising the above points is an integral part of the monitoring and reporting process (GTZ et al, 2006: 9).

Criteria for G-1 marker:

- The development intervention makes a significant and relevant contribution to achieving gender equality in the sector in question, or at a regional level.
- Concrete impacts on gender equality are formulated using results chains, and appropriate indicators are developed. In programmes, evidence of gender equality must be provided in the form of a component objective or an indicator relating to the main objective of the development measure.
- Potentially supportive measures to promote gender equality are described and laid out in the concept for the development intervention.
- Gender-specific disadvantages will not occur or, where they cannot be avoided, will be offset by additional measures.

- The approach and procedures adopted to promote gender equality are an integral part of monitoring and evaluating the development intervention (GTZ et al, 2006: 10).

Criteria for G-0 marker:

- An intervention should be classed as G-0 if there is no reason to expect that it will have any gender-specific impacts. This G-marker may only be used under exceptional circumstances, and the reasons must be explained separately.
- The fact that men and women will benefit equally from the output of a development intervention does not warrant a classification as G-0 (GTZ et al, 2006: 10).

The reason that the G-0 marker may only be used under exceptional circumstances is due to the fact that gender equality should be mainstreamed in all development interventions. Moreover, with the use of the new criteria it is not longer possible to use the G-0 marker when not enough data is available or when the development intervention has not been verified for its potential gender impact (these interventions should be classified as ‘not screened’, consistent with the OECD/DAC guidelines) (GTZ et al, 2006)<sup>2</sup>.

To ensure quality, every project proposal that is valued with G-0 has to be approved by the department in charge of gender issues at the BMZ before the implementing agencies can be contracted. When a project proposal is valued with G-1 or G-2 the implementing agencies and the regional department at BMZ are responsible for the quality control. Besides, external evaluations should include the application of the G-marker (GTZ et al, 2008). New aid modalities such as Sector Wide Approaches (SWAp), budget support and silent partnerships are still seen as a challenge (GTZ et al, 2008).

The guidelines for the application of the G-marker of the German bilateral development agencies, ‘Impacts on Gender Equality in Development Cooperation Interventions: Gender Markers in Technical and Financial Cooperation’ give ample examples of projects in the different priority areas of German development cooperation valued with G-2, G-1 or G-0.

*Denmark:*

Denmark makes efforts to improve the tracking of aid on cross-cutting issues, including gender<sup>3</sup>, in order to increase financial accountability for policy commitments (OECD/DAC, 2008c). In doing so, a more precise estimate is provided than through the systematic use of the G-marker (Ministry of Foreign Affairs of Denmark, 2008) and it is expected that attention to gender equality and women’s empowerment will increase (OECD/DAC, 2008c). All staff are obliged to specify the budgetary allocations related to gender (and to environment, good governance/ human rights and hiv/aids) for all Danish funded development co-operations (bilateral, multilateral, humanitarian and NGO assistance) (Ministry of Foreign Affairs of Denmark, 2007). In order to create a baseline for total budget allocations to the cross-cutting issues, all ongoing programmes with disbursements in 2007 were assessed. In the future, this baseline will be used to evaluate if budgetary allocations related to gender has increased or decreased. Moreover, the baseline will be an important instrument to guarantee that allocations reflect policy priorities (Ministry of Foreign Affairs of Denmark, 2008). Since

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<sup>2</sup> Maybe due to a stricter application of G-0 by German Development Cooperation, the percentage of ‘not screened’ increased in the 2005-2006 OECD/DAC report from 0% in 2005 to 29.0% in 2006 and 2007 (OECD/DAC, 2008b and 2009a).

<sup>3</sup> Danish development co-operation defines gender equality as follows: ‘- equal rights (political, civil, economic, social including sexual and reproductive as well as cultural) for women and men; equal access to and control of resources for women and men; equal opportunities to achieve political and economic influence for women and men’ (Ministry of Foreign Affairs of Denmark, 2007: 18).

2007 the registration of budget allocations has been made obligatory as part of the formulation of programmes (Ministry of Foreign Affairs of Denmark, 2007).

Gender equality could be supported through a direct, targeted intervention or mainstreamed in the programme, component or project. When gender equality is a targeted intervention (gender equality is a principal objective of the programme, component or project), 100% of the budget will be allocated to gender equality. When gender equality is mainstreamed in the programme, component or project, the allocation is 100% when gender equality is mainstreamed in a principal way, 20% when gender equality is mainstreamed in a significant way and 0% when gender equality is mainstreamed in an insignificant way or not at all (Ministry of Foreign Affairs of Denmark, 2007). The criteria used for these mainstreaming allocations are shown in table 3.

Table 3: Overview of the assessment on mainstreaming of gender equality

Category	Marker	Criteria
100%	Principal <sup>4</sup>	Gender addressed at levels of: - Background/ strategy/ national policy - Objectives - Outputs/ activities - Indicators
20%	Significant	Gender addressed at levels of: - Background/ strategy/ national policy - Outputs/ activities - Indicators
0%	Absent	Gender keywords mentioned but not addressed at levels of: - Outputs/ activities - Indicators Or not mentioned at all

Source: Ministry of Foreign Affairs of Denmark, 2007

For the assessment of general budget support programmes the national finance bill, budget or other documents that describe overall Government spending should be used. If limited information is available on the allocation to gender in the national budget, the financial allocation to the Ministry involved with gender issues could be assessed (Ministry of Foreign Affairs of Denmark, 2007).

In order to help staff with the assessment, the Ministry of Foreign Affairs of Denmark developed a guide with a step-by-step approach to be used on bilateral assistance. Staff must go through five tables in which the following questions should be answered with ‘yes’ or ‘no’ (using the indicators mentioned above):

- A. *Does the whole intervention (programme/ component/ project) specifically target gender equality?* If yes, gender is considered as a targeted intervention. If no, go to B.
- B. *Do particular parts of the intervention specifically target gender equality?* If yes, gender is targeted at a lower level than the programme/ component/ project as a whole. If no, go to C.
- C. *Is gender equality thoroughly and consistently mainstreamed in the programme/ component/ project?* If yes, gender is mainstreamed in a principal way (Principal Marker, allocation 100%). If no, go to D.

<sup>4</sup> The use of the Markers is somehow confusing, as the **Principal Marker** is used by Denmark when gender is fully mainstreamed in the intervention. It is not used for targeted interventions (in these interventions gender is a **principal objective**). This is not in line with the OECD/DAC G-Marker system where a fully mainstreamed intervention does not get a Principal Marker (G-2), but a Significant Marker (G-1).

- D. *Is gender equality mainstreamed in the programme/ component/ project in a significant extent?* If yes, gender is mainstreamed in a significant way (Significant Marker, allocation 20%). If no, go to E.
- E. *Is gender equality weakly mainstreamed or not at all?* -> Absent Marker, allocation 0%.

For multilateral development co-operation and support through NGOs, documentation of the organisations should be used to assess the budget allocation to gender equality (as a percentage of the total budget %). If information is insufficient or not available in documents, the needed information should be requested from the organisations. If an earmarked contribution to gender equality is provided, the budget allocation is 100% (Ministry of Foreign Affairs of Denmark, 2007).

### *Canada*

CIDA developed a framework for assessing gender equality results in order to address the central question: 'to what extent do CIDA's development results reflect its policy commitment to gender equality? (CIDA, 2005:2)'. The focus is therefore on development results instead of on processes, inputs or efforts. The framework provides two different approaches, one for directive and responsive programming and one for core funding of institutions<sup>5</sup>.

The approach for directive and responsive programming consists of an initial phase and a follow up phase. In the initial phase an assessment tool is used to categorize and rate gender equality results. Ten categories are identified consisting of key elements of the three corporate objectives as formulated in the 'CIDA's Policy on Gender Equality' (CIDA, 2005):

**Decision making** ("more equal participation of women with men as decision makers in shaping the sustainable development of their societies")

- 1 capacity for public participation
- 2 representation among decision makers
- 3 household and individual decision making

**Rights** ("women and girls more able to realize their full human rights")

- 4 legal system
- 5 public awareness
- 6 response to gender-specific rights violation

**Development resources and benefits** ("reduced inequalities between women and men in access to and control over the resources and benefits of development")

- 7 livelihoods and productive assets
- 8 institutional capacity
- 9 policy change
- 10 well-being and basic needs

For each key element it should be indicated i) whether results are made, ii) the evidence of results and iii) the significance of the results (the rating). The rating consists of four scales: significant, encouraging, modest and weak. The criteria for the scales are shown in table 4.

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<sup>5</sup> In directive programming, CIDA identifies, designs and implements projects; in responsive programming, CIDA contributes to projects proposed by others who take responsibility for design and implementation; in core funding/ institutional support, CIDA supplements the resources of organizations with which it has common interests and CIDA is not involved in the details of the initiatives funded by the partner (CIDA, 2005).

Table 4: rating scale for significance of gender equality results

Scale	Indicators
Significant	Gender equality result is relevant to the main results of the investment.  There is adequate evidence to back the claim on results.  Reach/ target of gender equality result is significant.
Encouraging	Gender equality result is relevant to the main results of the investment.  <i>and</i>  There is adequate evidence to back the claim on results.  <i>or</i>  Reach/ target of gender equality result is significant.
Modest	Gender equality result is relevant to the main results of the investment.  There is only partial evidence of results achieved.  Reach/target is more limited.
Weak	A gender equality result can be identified that is relevant to the main results of the investment, but evidence of results achievement is weak, anecdotal or non-existent.  <i>or</i>  A gender equality result is identified but is peripheral or marginal to the main results achieved.  <i>or</i>  Reach is very limited

Source: CIDA, 2005

The combined ratings on the different key elements will determine the overall rating: i) significant if the investment has at least one significant rating; ii) encouraging if the investment has at least one encouraging rating; iii) modest if the investment has at least one modest rating; iv) weak if the investment has at least one weak rating; and none if no gender equality results are identified (CIDA, 2005).

In the follow-up phase, and based on the assessment in the initial phase, focused studies (including field research) are conducted regarding factors conducive to achieving results, reasons for gaps in performance and implications for project selection, design and management by CIDA (CIDA, 2005).

The approach for core funding of institutions consists of an initial phase and a follow-up phase as well. Budgetary support is included in this approach. The document in which the framework is described, acknowledges the fact that the use of budgetary support was quite new for CIDA at the time of writing (2005). Therefore it is noted that the appropriateness of

using the core funding assessment tool to budgetary support (and pooled funding) should be further assessed (CIDA, 2005).

The assessment of core-funded institutions consists of six factors:

- gender equality results (greater weight than the other factors)
- shift to a gender equality focus
- supportive institutional policy framework
- institutional enabling environment
- institutional momentum and commitment
- gender balance/ employment equity

Four scales are identified for the rating of each of the six factors: i) good, ii) promising, iii) fair and iv) concern. The framework formulates indicators for the scales for each factor (see annex 2). The ratings on the six assessment factors should lead to an overall assessment, using the same scales, but adding 'excellent' (given when all factors are rated 'good') (CIDA, 2005).

In the follow-up phase focused studies are conducted in order to strengthen CIDA strategies for selecting and/ or working with core-funded organisations (CIDA, 2005).

The framework of CIDA is included in an issue brief of GENDERNET on 'Managing for Gender Equality Results in Donor Agencies' (OECD/DAC, 2009b) as a good example of using results-based approaches to gender equality and women's empowerment. According to the issue brief: 'thanks to the framework, a shift has occurred among both staff and management – from referring to CIDA's gender equality policy *objectives* to instead examining the corporate gender equality *results*' (OECD/DAC, 2009b: 4). Besides, 'CIDA's gender equality institutional assessments have proven to be extremely strategic. Although direct attribution to these assessments is difficult, CIDA has observed that gender equality issues, specialists and units gain greater visibility and profile within partner institutions through the assessment process. Achieving a shared understanding with the partner has generated ownership within the assessed institution (OECD/DAC, 2009: 4). The issue brief concludes by highlighting that 'the lesson to date is that measurement and assessment are key to achieving gender equality results' (OECD/DAC, 2009b: 4).

### **3. The application of the G-marker to General Budget Support**

This chapter aims to feed into the internal discussion on the application of the G-marker to General Budget Support (GBS); it is not a directive. This chapter is organised as follows: it sets out with a short overview of the importance the EC attaches to addressing gender concerns within GBS, next, information from the OECD/DAC regarding the application of the G-marker to GBS is provided, and finally, a suggestion is made on how the G-marker could be applied to GBS.

Different EC documents refer to the importance of addressing gender issues within GBS. The Guidelines on the Programming, Design and Management of General Budget Support (EC, 2007) specifically underline this issue while referring to Millennium Development Goal 3 (MDG3). The guidelines indicate that gender issues could be considered in the choice of performance criteria and indicators for the disbursement of tranches. Besides, gender budgeting is mentioned as a tool for gender mainstreaming in countries where Public Finance Management (PFM) capacity attained a certain level (EC, 2007).

A communication from the Commission to the European Parliament and the Council on gender equality and women's empowerment in development cooperation (Commission of the European Communities, 2007), refers to the use of gender sensitive indicators for the disbursement of incentive tranches as well. Moreover, the communication indicates that this



should go hand in hand with a high quality policy dialogue. Subsequently, the Council confirms that gender issues should be included in budget support and the accompanying policy dialogue. Moreover, “the Council therefore calls on the Commission and Member States to integrate gender equality as a core value and goal of EU development cooperation in the elaboration and implementation of the new aid modalities and to support partner countries in the process of targeting interventions and resource allocations to gender equality and women’s empowerment in sector policies and programs as well as national poverty reduction and growth strategies, medium-term expenditure frameworks and national budgets and to this effect also promote gender responsive public financial management systems and performance assessment frameworks” (Council of the European Union, 2007: 6). Furthermore, the Council “calls on the Commission and Members States to systematically apply the gender policy marker as a strategic tool for effective targeting and monitoring of aid allocations to gender equality and women’s empowerment and to the elimination of the gap between policies and their implementation” (Council of the European Union, 2007: 5).

As the Reporting Directives for the Creditor Reporting System (CRS) prescribe that a policy marker should be applied to all bilateral aid (excluding administrative costs) and cover all forms of aid (OECD/DAC, 2008a) and taking into account the importance attached by the EC to gender equality in the context of GBS, it is clear that the EC should apply the G-marker to GBS.

However, due to difficulties with assessing the contribution of GBS to gender equality and women’s empowerment, the DAC Working Party on Statistics indicated that the application of the G-marker to budget support is rather impossible at this moment (OECD/DAC, 2007b). Nevertheless, during the Joint Biennial Workshop of the DAC Network on Gender Equality (GENDERNET) and the UN’s Inter-Agency Network on Women and Gender Equality (IANGWE) the DAC Working Party on Statistics and GENDERNET agreed to jointly explore the possibility of the development of guidelines for applying the G-marker to GBS and Sectoral Budget Support (SBS) to ensure comparability of members’ reporting (OECD/DAC, 2008c). In the DAC Guiding Principles for Aid Effectiveness, Gender Equality and Women’s Empowerment “establishing a process for applying the DAC Gender Equality Policy Marker to programmatic aid” (OECD/DAC 2008d: §13) is included as an effective strategy to track performance and build capacity.

Because the G-marker is intended as a tool for international comparison it is advisable to wait for the guidelines of the OECD/DAC before applying the G-marker to GBS within EuropeAid. On the other hand, the G-marker could already be applied internally to increase the gender sensitivity of GBS. For example, all GBS (and SBS) could be assessed in order to create a baseline of the present state of gender sensitivity of GBS (and SBS) (see the example of Denmark). This baseline could be a starting point for internal comparison between different partner countries and/or different sectors and for analyses why in certain countries and/or sectors gender equality has been successfully mainstreamed in GBS and why in others not. On the basis of this kind of analyses measures could be taken to increase the percentage of GBS with a higher G-score. In the next paragraphs some suggestions are listed on how the G-marker could be applied to GBS (and SBS).

As a G-2 score is only given when gender equality is a principal objective and when the activity would *not* have been undertaken *without* a gender equality objective, it is difficult to imagine that GBS could ever receive a G-2 marker. This is only possible in the case of SBS when the beneficiary is the ministry in charge of gender equality and empowerment. When gender is systematically mainstreamed in GBS a G-1 score should be given. In practice, even if on paper the EC has the intention to mainstream gender within GBS, gender concerns will not always be mainstreamed systematically or even not be mainstreamed at all. Therefore, a G-1 marker could not be automatically given, but EuropeAid could (or should) strive to

mainstream gender systematically and, like Germany, use the G-0 marker only in exceptional cases with a good based motivation.

Because GBS is normally provided on the basis of the poverty reduction policy of the receiving country (often the poverty reduction strategy paper (PRSP)), the EC is not solely responsible for the mainstreaming of gender equality within GBS. If gender equality is not (sufficiently) taken on board in the poverty reduction policy and no budget is reserved for gender equality activities, it will be difficult to allocate a G-1 score to GBS if the G-marker system is strictly followed, even if the EC initiate activities to promote gender equality. Therefore, in order to be able to distinguish different levels of mainstreaming (following the example of Denmark), but at the same time stay as close as possible to the official G-marker system, we suggest to apply a differentiation in score G-0<sup>6</sup>. In this way the definition for G-1 remains the same as in the official G-marker system, G-0-1 can be applied when gender concerns are partly mainstreamed and G-0-0 when gender concerns are not or insufficient mainstreamed. The table below might be helpful in deciding which G-score to allocate.

<b>Mark</b>	<b>Indicators</b>
G-1	Gender equality is integrated in the diagnosis section, the objectives <i>and</i> budget of the PRSP of the receiving country.  <i>and</i>  Gender equality is integrated in the diagnosis section, the objectives <i>and</i> budget of the Country Strategic Paper of the EC.  <i>and</i>  Gender sensitive indicators are used for the disbursement of incentive tranches.  <i>and</i>  Gender equality is included in the policy dialogue.
G-0-1	Gender equality is integrated in the diagnosis section, the objectives <i>and</i> budget of the Country Strategic Paper of the EC.  <i>and</i>  Gender sensitive indicators are used for the disbursement of incentive tranches.  <i>and/or</i>  Gender equality is included in the policy dialogue.
G-0-0	In all other cases

The relative importance of the indicators should be discussed internally. For example, in this table the integration of gender equality in the Country Strategic Paper is obligatory for both the G-1 score and the G-0-1 score, while the mainstreaming in the PRSP is only obligatory for the G-1 score. Both gender sensitive indicators and inclusion of gender equality in the policy

<sup>6</sup> One could expect that the OECD/DAC will also differentiate in the score for mainstreaming when developing guidelines for applying the G-Marker to programme aid.

dialogue could be obligatory for score G-0-1. G-0-0 should only be given on the basis of a good motivation.

#### **4. The Gender Equality Policy Marker: its usefulness**

As already indicated in the paragraphs above, in addition to international comparison, the G-marker could also be a useful tool for internal accountability and learning as well. EuropeAid could use the G-marker system as a monitoring instrument that indicates in which areas gender mainstreaming and specific gender equality efforts are making progress and in which areas improvements are still needed. In order to make analyses as interesting as possible it would be necessary to refine the database in order to make comparative analyses among aid modalities, sectors and financing instruments and to follow-up the scores during implementation and monitoring as scoring is currently only performed early in the cycle (Holvoet and Inberg, 2009). In this respect it is positive that the G-marker is currently included in the Background Conclusion Sheet (BCS) of the ROM-system, which also provides a better database to perform gender-budget analyses (Holvoet and Inberg, 2009).

As indicated in our document on gender budgeting (Holvoet and Inberg, 2009), the G-marker should also be included in the identification fiche, the financial proposal/ action fiche, the Common Relex Information System (CRIS) and in the annual report.

In order to use the G-marker effectively, the gender desk of EuropeAid should provide training, including on the job training, for staff on how to apply the G-marker and how to increase overall gender sensitivity (how to increase the percentage of GBS/SBS activities with a G-1 marker). In order to monitor progress in the application of the G-marker, it is recommended that the gender desk yearly performs an assessment (selecting a representative sample of interventions) of the quality of the application of the G-marker.

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## Annex 1. Instruction on how to apply the Gender Equality Policy Marker

The OECD/DAC introduced the Gender Equality Policy Marker (G-marker) in 1997 with the aim to facilitate monitoring and co-ordination of DAC Member's activities in support of gender equality. In the present Reporting Directives for the Creditor Reporting System it is defined that "an activity should be classified as gender equality focused (score 'Principal' or 'Significant') if it is intended to advance gender equality and women's empowerment or reduce discrimination and inequalities based on sex" (OECD/DAC 2008a: 4).

Criteria for eligibility are: gender equality is explicitly promoted in activity documentation through specific measures which (a) reduce social, economic or political power inequalities between women and men, girls and boys, ensure that women benefit equally with men from the activity, or compensate for past discrimination; (b) develop or strengthen gender equality or anti-discrimination policies, legislation or institutions (OECD/DAC 2008a:4).

Three different values are used in the marking system:

Gender equality is a principal objective (G-2): those objectives which can be identified as being fundamental in the design and impact of the activity and which are an explicit objective of the activity.

Gender equality is a significant objective (G-1): those objectives which, although important, are not one of the principal reasons for undertaking the activity.

Gender equality is not targeted to the policy objective (G-0): the activity has been screened against, but was found not to be targeted to, the policy objective (OECD/DAC 2008a: 2).

The following table with questions and indicators, based on the OECD/DAC description of the G-marker<sup>7</sup>, could be helpful to decide which G-marker a project or programme should get.

Question	Indicators	G-marker
Is promoting gender equality a primary policy objective of the activity?  If yes, go → If no, go ↓	The principal or overall objective of the activity is specifically focused on gender equality.  The activity would not have been undertaken without the gender-equality objective	G-2
Is promoting gender equality a secondary policy objective of the activity?  If yes, go → If no, go ↓	Gender equality is mentioned in the description of the objectives of the activity.  Gender equality is included in the activities and output indicators of the activity.  The activity would have been undertaken without the gender-equality objective.	G-1
Is gender equality not targeted as a policy objective? →	Gender equality is not or hardly mentioned in the activity document.  Gender equality is not included in the activities and output indicators of the activity.	G-0

<sup>7</sup> Besides the OECD/DAC description of the G-Marker the examples of Germany and Denmark and a checklist of the Swiss Agency for Development and Cooperation (SDC) are used.

Annex 2: CIDA's assessment tool of core funding

Step 1: Rating of specific elements of institutional strategy, structures and achievements		
Institutional Performance: What are we looking for?	Rating	Decision criteria for rating
<b>1. Gender Equality Results</b> Institutional programming contributes toward gender equality development results. Institutional systems are in place to monitor results, and these are regularly reported on. (As in the Beijing Platform for Action or PFA, gender equality results refer to women's empowerment and equality of women and men)	Good	- Institutional monitoring systems on actual results show that a significant proportion of programming contributes to gender equality - Annual reports clearly document consistent results relating to gender equality and report on progress towards specific, measurable targets.
	Promising	- Institutional monitoring/ evaluation of actual results provides some information on results related to gender equality and shows that some programming contributes to gender equality (i.e., gender equality results are at least tracked, even if actual results are less than significant or substantial).
	Fair	- Institutional monitoring reports only on anecdotal achievements relating to gender equality.
	Of concern	- Institutional monitoring/ evaluations of results is weak (or non-existent) and provides no information on results related to gender equality.
<b>2. Shift to a Gender Equality Focus</b> The institution's approach (in its policy and related documentation on gender equality) reflects the international consensus reached in international documents, such as the Beijing PFA and the full implementation of CEDAW. Gender equality is seen as an explicit development goal and as integral to the achievements of other development goals, such as the Millennium Development Goals (MDGs).	Good	- There is a clear focus on gender equality and women's empowerment as integral to development (as a goal in itself and integral to other development goals). - There are clear links between gender equality goals and the overall mandate of the organization. - There is a clear focus in the policy on results.
	Promising	- Although it had an approach that emphasized service delivery or women as a vulnerable group, it is in the process of reviewing and clarifying its approach in lights of its institutional mandate and the international consensus reached in the Beijing PFA.
	Fair	- The institution's gender equality policy focuses primarily on its internal process (i.e., training of staff or the need to do a gender analysis) with few commitments to achieve and monitor results.
	Of concern	- The primary focus is on service delivery to women or women as a "vulnerable group", with limited attention to the social/ institutional underpinning of gender disparities and discrimination against women. There is no results focus.
<b>3. Supportive Institutional Policy Framework</b> Gender equality perspectives are evident in the major policy and planning documents guiding the work of the institution. For example, gender perspectives and/ or expected results are evident in: - Poverty reduction policies - Strategic plans - MDG implementation plans - Sectoral policies relating to environment, education, post-conflict, etc. - Evaluations	Good	- The governing strategy document or policy paper for the institution organization incorporates gender equality perspectives in the aims and guidance it sets out, and makes clear links between gender equality and major institutional policy concerns. - Sectoral policies consistently include attention to gender equality issues.
	Promising	- Gender equality perspectives in the governing strategy or policy are limited, but have been incorporated in a substantive way in at least one important sectoral or thematic strategy or policy statement (in addition to any separate gender equality policy statement).
	Fair	- There are only occasional references to gender equality with only limited analysis of the links between gender equality and other development objectives.
	Of concern	- Only pro forma references to gender or gender equality are found in agency policies/ strategies (other than a gender equality policy).

<p><b>4. Institutional Enabling Environment</b> The institution has developed a comprehensive and systematic approach to ensure attention to gender equality results throughout the organization. Consider, for example:</p> <ul style="list-style-type: none"> <li>- knowledge/ skills of staff (commitment to develop these through training, etc.);</li> <li>- operational manuals and tools;</li> <li>- clear accountability structures for policy implementation;</li> <li>- availability of expertise; budget allocations; and</li> <li>- partnerships and consultation with women's organizations.</li> </ul>	Good	- The institution has developed a positive and supportive environment for ensuring that gender equality perspectives are systematically incorporated in institutional programs.
	Promising	- The institution has taken several steps to strengthen the enabling environment and seeks to develop and implement ways to promote systematic attention to gender equality issues in institutional programs.
	Fair	- The institution has taken some steps to develop an enabling environment but there does not appear to be current support for further development.
	Of concern	- Few and ad hoc steps have been taken, or there are some measures in place, but there is evidence that major opportunities are missed, that policies, tools or guidelines are not used, or that action on gender equality depends on individual initiative rather than institutional approaches.
<p><b>5. Institutional Momentum and Commitment</b> The institution demonstrates ongoing commitment to pursue gender equality objectives. This can be seen in:</p> <ul style="list-style-type: none"> <li>- positive trends regarding the strengths and profile of a gender equality unit;</li> <li>- trends regarding institutional investments in gender equality; and</li> <li>- speeches and statements by the leadership of the organization.</li> </ul>	Good	- The institution has maintained a satisfactory level of commitment to achieve gender equality results and has continued to evolve approaches.
	Promising	- The approach has been less than satisfactory, but there is evidence of increasing attention and commitment (e.g. steps to identify and address problems or gaps related to performance on gender equality).
	Fair	- There has been some attention to gender equality issues; however, overall institutional commitment appears unenthusiastic and they remain a marginal concern of the organization as a whole.
	Of concern	- There is limited attention to, and investment in, exploring gender equality issues and approaches to incorporating gender equality objectives in programming. OR - There appears to be a decline in investments relating to implementing the institution's commitment to gender equality or a downgrading of this policy theme.
<p><b>6. Gender Balance/ Employment Equity</b> The institution is working towards gender balance in staffing throughout the organization, in particular in management positions.</p>	Good	- The organization consistently sets and meets targets and is moving toward equal numbers of women and men, with specific attention at the senior levels.
	Promising	- The institution has made recent progress towards equity targets, and there appears to be internal momentum.
	Fair	- The organization has set targets for employment equity, but there is not a robust plan to achieve those targets.
	Of concern	- The organization has few women in management positions, and employment equity/ gender balance does not appear to be a priority.

Source: CIDA, 2005, 13 and 14