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DISCUSSION PAPER No. 337

More than targets: How the EU promotes democracy, human rights and gender equality through Global Europe and beyond

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March 2023

Alongside poverty eradication, promoting democracy, human rights and gender equality are key objectives of NDICI-Global Europe, the EU's financial instrument for neighbourhood, development and international cooperation. This paper analyses the extent to which the EU has managed to integrate these objectives into the NDICI-Global Europe planning – in the programming documents – and the first stages of implementation.

While preliminary reports indicate that the EU is on track overall to achieve the NDICI-Global Europe targets, these figures only cover part of the picture and need to be translated into concrete actions. Advancing democracy, human rights and gender equality goes beyond NDICI-Global Europe and is largely carried out in the context of the EU's broader foreign and development policy.

The EU should reflect on how to best combine its various ways of promoting democracy, human rights and gender equality, including through mainstreaming, targeted actions and conditionalities. The EU should also ensure relevant policies and tools – such as its action plans on gender and on human rights and democracy – work in harmony and are more systematically integrated into dialogues with partner countries.

Promoting democracy, human rights and gender equality is a joint responsibility of the EU and its member states, who should strengthen the Team Europe approach to raise the EU's profile on these topics. Country ownership and buy-in from all stakeholders are also essential and the EU should ensure involvement at all levels to make sure that these principles and values are tackled and implemented in a meaningful and sustainable manner.

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Acknowledgements

This discussion paper was produced under the partnership between ECDPM and the Swedish Presidency of the Council of the European Union 2023. The authors are grateful to individuals at the Swedish Ministry of Foreign Affairs, at the Permanent Representation of Sweden to the European Union (EU) and at the Swedish International Development Cooperation Agency (Sida) for their feedback. This work builds on desk research and over twenty interviews carried out between October and December 2022 with representatives of the EU institutions, both at the EU headquarters level and in delegations, diplomatic missions of Sweden in South Africa, Zambia and Kenya, as well as civil society organisations (CSOs). The authors are grateful to all those who shared views and insights during the interviews. The authors would like to thank ECDPM colleagues Mariella Di Ciommo and Katja Sergejeff for their peer review and suggestions, and Annette Powell, Nina Thijssen and Yaseena van 't Hoff for their work on layout and communication. The views expressed in this paper are those of the authors and do not represent those of the Swedish Presidency or ECDPM. Any errors or omissions remain the responsibility of the authors. Comments are welcome and can be sent to Amandine Sabourin (asa@ecdpm.org) and Alexei Jones (aj@ecdpm.org).

Acronyms

AU	African Union
CLIPS	Country-level implementation plans
COVID-19	Coronavirus disease 2019
CSOs	Civil society organisations
DAC	Development Assistance Committee
DEAR	Development education and awareness raising
DFIs	Development finance institutions
DG INTPA	Directorate-General for International Partnerships
DG NEAR	Directorate-General for Neighbourhood and Enlargement Negotiations
EBRD	European Bank for Reconstruction and Development
EC	European Commission
ECDPM	European Centre for Development Policy Management
EDFI	European Development Finance Institutions
EEAS	European External Action Service
EFSD+	European Fund for Sustainable Development Plus
EIB	European Investment Bank
EP	European Parliament
EU	European Union
FPI	Foreign policy instrument
GAP	Gender action plan
GEWE	Gender equality and women's empowerment
GG	Global gateway
HRBA	Human rights-based approach
LA	Local authorities
LGBTQ+	Lesbian, gay, bisexual, transgender, queer and intersex
MFF	Multiannual financial framework
MIPs	Multiannual indicative programmes
MS	Member states
MTR	Mid-term review

NDICI-Global Europe	Neighbourhood, Development and International Cooperation instrument–Global Europe
ODA	Official Development Assistance
OECD	Organisation for Economic Co-operation and Development
OJEU	Official Journal of the European Union
PFD	Policy Forum on Development
Sida	Swedish International Development Cooperation Agency
SRHR	Sexual and reproductive health and rights
TE	Team Europe
TED	Team Europe Democracy
TEI	Team Europe Initiative
TFEU	Treaty on the functioning of the European Union
WPS	Women, peace and security

Introduction

The Neighbourhood, Development and International Cooperation Instrument - Global Europe aims to uphold and promote the European Union's values, principles and fundamental interests worldwide in order to pursue the key principles and objectives of EU external action, as laid down in the Treaty on the European Union. The promotion of democracy, rule of law and respect for human rights, including gender equality is at the core of EU external action, and the primary objective of EU development policy is the reduction and, in the long term, the eradication of poverty.

The NDICI-Global Europe regulation covers a wide range of topics and thematic priorities to this end and includes several spending targets in specific areas (such as human development, migration and climate) as well as gender targets to guide its actions. The NDICI-Global Europe regulation also refers to the international framework on development effectiveness principles as an important foundation for the EU external action, and stresses the importance of "country ownership". Implementing the aid effectiveness principles and ensuring country ownership are key to reach the common goals set for the EU and its partners, including on matters related to human rights, democracy and gender equality.

The programming of the instrument was finalised last year and the actions are still at a very early stage of implementation. The first figures indicate that the EU is on track overall regarding its commitments and targets in the programming of the instrument. This, however, needs to be confirmed and applied further during the implementation phase in the next few years. The extent to which the annual action plans will effectively translate multiannual indicative programmes (MIPs) into concrete actions and achieve the targets therein will be the determining factor. Beyond this, the results and impact of EU actions will have to be closely monitored.

This paper looks at how democracy, human rights and gender equality priorities and spending targets are being operationalised in the programmes of the NDICI-Global Europe, and how to ensure that they continue receiving the right level of political attention and level of funding. This not only means ensuring that the EU spending targets are met overall but also that thematic priorities and objectives, notably values and principles, are fully integrated into the programming of the NDICI-Global Europe, and translate into concrete actions in the implementation phase.

Promoting democracy, human rights and gender equality is a joint responsibility of the EU and its member states (MS), and the Team Europe (TE) approach should also contribute to raising the profile and leverage of the EU regarding their promotion. In particular, the recently launched Team Europe Initiatives (TEIs) involving the EU and member states, their implementing agencies and European development finance institutions (DFIs) should play a key role to this end.

In 2023, the EU institutions will start laying the ground for the midterm review of the NDICI-Global Europe which will take place in 2024. In parallel, midterm reviews will be conducted for the EU Action Plan for human rights and democracy and the Gender Action Plan III. The first EU voluntary review will also be conducted by the EU institutions, to assess the implementation of the Agenda 2030 in the EU. One key point is to ensure that these different policies, processes and tools complement each other, and are aligned, to ensure delivery of effective development.

It is therefore timely for the EU to have a first general assessment and discussion on whether and how certain key priorities and principles have been effectively integrated in the programming and first stages of implementation of the NDICI-Global Europe and TEIs, and what necessary adjustments might be needed to strengthen their prominence moving forward.

1. The integration of human rights, democracy and gender equality in the MIPs and TEIs

1.1. Thematic priorities and targets in the NDICI-Global Europe

The NDICI-Global Europe regulation, its delegated act, as well as the programming guidelines provide a set of horizontal spending targets for specific priorities across the instrument, and some thematic targets for the geographic programmes. The instrument is aligned with the international agenda and commitments, including the 2030 Agenda and the Paris Agreement on Climate Change which bring a set of additional goals, indicators and targets, to which the EU is committed to contributing towards.

Most targets apply to the instrument as a whole and should be fulfilled for the overall 2021-2027 period. Yet, some of the NDICI-Global Europe targets do not apply to the programmes according to the same methodology. On the one hand, some spending targets are set in the overall regulation in a horizontal manner and are therefore applicable across the instrument and its different pillars. They can be considered ‘hard’ targets. For example, the 30% spending target on climate change objectives, or the spending target that at least 93% of the funds allocated through the programmes should comply with the criteria for Official Development Assistance (ODA). On the other hand, another set of targets has a more restricted scope and has either been defined on actions or apply only to the geographic programmes. This is the case for the human rights, democracy and governance spending target which applies only to the geographic programmes. The gender equality target is not a spending target but a target on actions. Another distinction is to be made between legislative targets which are part of the regulation and are legally binding,¹ and political targets which correspond to European Commission (EC) objectives in specific areas.

Table 1: Horizontal and thematic targets

Topic/theme	Target	Source	Nature of the target
ODA	At least 93% of ODA	NDICI-Global Europe regulation	Legislative Spending target (legally binding)
Human development and social inclusion	At least 20% of the ODA spending is dedicated to human development and social inclusion	NDICI-Global Europe regulation	Legislative spending target
Education	As part of the human development target, at least 10% of expenditure (except in the Neighbourhood geographic programmes) should be dedicated to education	Programming guidelines	Political spending target set by Commissioner Jutta Urpilainen
Gender equality and women’s empowerment (GEWE) ²	At least 85% of new actions implemented under this Regulation should have gender equality as a principal or a significant objective, as defined by the gender equality policy marker of the Organisation for Economic Co-operation and	NDICI-Global Europe regulation	Legislative target on actions

¹ The preamble and recitals to EU regulations are not in themselves legally binding in the same way that the operative provisions are.

² GEWE also answers to an internal horizontal policy to be mainstreamed throughout the EU programmes, according to the Article 8 of the TFEU (OJEU 2016).

	Development (OECD) Development Assistance Committee (DAC) ³ At least 5% of these actions should have gender equality and women's and girls' rights and empowerment as a principal objective		
Climate change and biodiversity objectives	30% for climate change objectives; while contributing to the ambition of providing 7.5% of annual spending under the multiannual financial framework (MFF) to biodiversity objectives in the year 2024 and 10% of annual spending under the MFF to biodiversity objectives in 2026 and 2027, while considering the existing overlaps between climate and biodiversity goals	NDICI-Global Europe regulation	Legislative spending target
Migration and forced displacement	Indicatively 10% to support management and governance of migration and forced displacement, as well as to address the root causes of irregular migration and forced displacement when they directly target specific migration challenges	NDICI-Global Europe regulation	Legislative spending target
Digitalisation	Approximately 10% of the NDICI-Global Europe funding will be dedicated to digital actions	Joint communication on the Global Gateway (GG)	Political spending target
Human rights, democracy and good governance	at least 15% of geographic programmes for human rights, democracy and good governance	NDICI-Global Europe delegated act	Legislative spending target
Inclusive & sustainable growth	at least 45 % of geographic programmes for inclusive and sustainable growth for human development	NDICI-Global Europe delegated act	Legislative spending target

Source: NDICI-Global Europe regulation (OJEU 2021a); NDICI-Global Europe delegated act (OJEU 2021b); programming guidelines (EC 2021a, unpublished).

All the targets set in the NDICI-Global Europe regulation and delegated regulation, as well as in its programming guidelines, are useful tools to monitor the commitments regarding these priorities. Yet, the high number of targets raises the question of flexibility, and poses a number of methodological challenges. The system of indicators, baselines and targets to measure the outcomes of most activities differs from one topic to the other and a harmonised approach is still to be designed.

The NDICI-Global Europe is at an early stage of implementation and there are still limited available data to assess accurately and in details to what extent the horizontal priorities such as democracy, human rights and gender equality are effectively mainstreamed in the actions funded by the new instrument. Based on the available data and initial feedback from the Commission and the European External Action Service (EEAS) concerning the programming

³ The gender marker is a tool developed by the OECD-DAC used to track resource allocations of donors to promote gender equality. There are 3 gender marker scores: G-0: when gender equality is not targeted; G-1: when gender equality is a significant objective; G-2: when gender equality is a principal objective.

of the NDICI-Global Europe and design of TEIs, **the integration of these targets has been conducted in a thorough manner and the EU is on track to achieve them.** The total figures either concern the whole NDICI-Global Europe instrument, or the geographic pillar within it, but do not give a very detailed nor comprehensive view of the country level geographic programmes at this stage, let alone sub-national details. **This preliminary insight is based on what is written down in the programming documents and the TEIs:** it now needs to be further confirmed and translated into actions.

According to our interviews, human rights, democracy and gender equality feature in the majority of the MIPs, both thematic and geographic ones. Moreover, these topics were also addressed in the policy dialogue as well as during the programming exercise that fed into the MIPs. A closer look at these topics is undertaken below.

1.2. Human rights and democracy feature in the MIPs and TEIs

Protecting and promoting human rights and democracy are at the core of the relationships built by the EU with its partners. The EU has been teaming up with other organisations and stakeholders, for instance, in international fora, to reaffirm its commitment towards these principles. In the current multiannual financial programme, the human rights-based approach (HRBA) and toolbox have been strengthened. As a result, it seems that human rights and democracy benefit from strong references in the multiannual indicative programmes. On the contrary, TEIs integrate those priorities only mildly.

1.2.1. Strong references in the MIPs

The programming guidelines instructed the EU delegations to mainstream human rights and democracy throughout all programmes and actions. **According to our interviews, the vast majority of country MIPs support democratic governance, and 40 country MIPs are directly focusing on democracy, human rights and governance.** The 2021 annual report on EU external action indicates that human rights, rule of law and democratic governance are addressed in the majority of partner countries (EU 2022).

During the programming phase, the country allocations were also decided according to an allocation formula based on the needs, capacities, commitments and performance of partner countries. The partner's capacity and commitments to promote shared values, principles and interests, including human rights, fundamental freedoms, democracy, the rule of law, good governance, fight against corruption, open civic space and gender equality were part of this assessment. Moreover, the geographisation principle of NDICI-Global Europe implies that the thematic programmes complement those at the geographic level. Hence, EU delegations had to think of how their activities financed by thematic programmes complement their other programmes and activities within the geographic programme, as well as their public diplomacy, and/or the programmes/activities under the Foreign Policy Instrument (FPI), if applicable.

Regional programmes shall also deal with good governance, democracy and human rights, in the extent to which the ownership of regional organisations' member states is ensured, and the limited absorption capacity of the regional organisations is taken into consideration. The regional programme on Asia-Pacific mentions democracy, human rights and gender and acknowledges the role of the EU in the different sub-regions to support the promotion of these priorities (EC 2021i). Throughout its different windows, the regional programme Americas and the Caribbean sets the basis for the EU regional support to democracy, human rights promotion and gender equality (EC 2021b). For the Pan-American window, one component focuses on democratic governance, security and migration, whereas for the Caribbean-EU partnership's window, one component is dedicated to governance, security and human development. Among the 6 priority areas of the regional programme on sub-Saharan Africa, one area focuses on governance, peace and security, and culture, in which human rights are included (EC 2021c).

Human rights and democracy are also addressed in the thematic pillar of the NDICI-Global Europe, notably in the thematic programmes for human rights and democracy, and for CSOs.

- The priorities of the thematic programme on human rights and democracy are now completely aligned and reflect the exact same priorities as the EU action plan for human rights and democracy, to ensure consistency between the instrument and the action plan: the programme has five pillars: (1) protecting and empowering individuals; (2) building resilient, inclusive and democratic societies; (3) promoting a global system for human rights and democracy; (4) harnessing the opportunities and addressing challenges of new technologies; and (5) delivering by working together (EC 2021e).
- The thematic programme for CSOs recognises that CSOs are vital to the attainment of human rights, the rule of law and democracy. It will contribute, in complementarity with the programme on human rights and democracy, to the goals of the action plan for human rights and democracy notably by promoting *“an inclusive, participatory, empowered, and independent civil society and democratic space in partner countries; and an inclusive and open dialogue with and between civil society”*.⁴ EU delegations will manage 75% of the programme funds through country allocations (EC 2021f).

The first figures available on the implementation of the programmes at country level show that *“132 new initiatives were launched [...], led by civil society organisations in over 70 countries”*, including electoral observation activities (EU 2022).

The spending target of 15% for democracy, human rights and governance in the geographic programmes comes on top of actions financed through thematic programmes. This results from a request of the European Parliament (EP) and is mentioned in the Commission’s delegated regulation (OJEU 2021b) complementing the NDICI-Global Europe regulation (OJEU 2021a). To date, there are no publicly available figures regarding progress towards the achievement of this target.

1.2.2. Limited references in the TEIs

TEIs address democracy, governance and human rights to a lesser extent compared to the MIPs. Our research highlights that, out of 168 existing TEIs, only 20 country TEIs address governance and democracy as a primary priority, or as a component of the initiative. A few global and regional TEIs are worth mentioning as they focus specifically on democracy and governance issues.

Launched in 2021, the [Team Europe Democracy](#) initiative (TED) aims at promoting and protecting democracy and human rights worldwide. **TED is considered the most advanced thematic TEI, and sets a coordination mechanism among 14 member states (plus some observers), their agencies and banks, and the EU institutions.** The objective is to increase the operational coordination and contacts at country level on democracy-related matters, including rule of law, accountability and governance projects in partner countries. A coordinated network of EU and MS partners shall emerge from this initiative. The secretariat of this initiative also aims at supporting the EU in Brussels and in the EU delegations to increase coordination on the TEIs including democracy at country level, as well as bringing together CSOs and other stakeholders and supporting research on democracy.

Additionally, **two regional initiatives are** designed for Africa on [combating illicit financial flows and transnational organised crime](#) and in Latin America, on [security and justice partnership](#), both including a component on governance.

⁴ The second priority provides a frame for the implementation of the development education and awareness raising (DEAR) programme: *“A better-informed and more inclusive society with a developed sense of co-responsibility for sustainable development, including addressing global challenges (notably global inequalities and ecological crises)”*.

Box 1: Kenya: mainstreaming in the programmes and the TEIs

The 2021-2027 MIP for Kenya sets 3 priorities: (1) green transition, with a focus on environmental sustainability and resilience; (2) human development and digital inclusion, including human development - education, women, youth, urbanisation; and (3) **democratic governance, peace and security**, including conflict, migration and forced displacement. The last priority sets a particular **focus on strengthening rule of law and democratic governance and should be complemented by the thematic programme on human rights and democracy (EU 2021)**.

Two TEIs have been designed for Kenya: one tackles the [green transition](#), and another addresses the [digital transition](#). The latter aims to encourage a human-centred digitalisation and include **components on gender mainstreaming, and on reducing corruption, reducing digital divides between women and men, and an open and inclusive digital governance, as well as a land governance programme, for instance**. Eighteen member states are represented in Kenya, among which twelve are active as development partners. The EU and the member states present in Kenya had already come up with a [joint programming strategy 2018-2022](#) before joining forces in two TEIs: accountability and governance, which are its first priority.

According to representatives of the EU delegation and embassies interviewed during the research, the choice for the MIPs and TEIs' priorities was obvious. For a few years, Kenya has been committed to a green transition with a large scope of challenges, such as the preservation/conservation of its wildlife, and the direct impact of climate change on the population. With the United Nations Environment Programme based in Nairobi, Kenya is also at the forefront of the global climate change agenda. In parallel, Kenya also has a huge digital ecosystem, with a potential for transformation through all sectors. The TEI on digitalisation was the occasion for the EU and its member states to accompany the country on the realisation of its digital master plan 2022-2032 (Government of Kenya 2022).

In Kenya, reference to gender equality is made in the programmes on various topics, such as agriculture (Agribiz programme), land-sea management (Go Blue project), justice and governance project (Plead 2), as well as in the TEI on digitalisation. The EU delegation coordinates a task force on gender, including stakeholders from Kenya and development partners.

The Government of Kenya also commits to the integration of priorities related to democracy, human rights and gender, for instance in its [National Development Plan – medium term plan III](#). Its constitution, amended in 2010, also insists on its *“commitments to democracy, human rights, rule of law, social justice and public participation”*.

The promotion of democracy and the respect for human rights are also a political priority for the EU regionally, as this is a key priority area of its strategy on *“the Horn of Africa as a geo-strategic priority for the EU”* (CoEU 2021), for which Kenya is a key partner economically and politically.

1.3. Gender equality features in the MIPs and TEIs

Mainstreaming gender equality is a political priority for the Commission within the EU, as well as outside the EU's borders. The GAP III (2021-2025) is the principal strategic document guiding the EU's promotion of GEWE in its

external action, including the women, peace and security agenda (WPS).⁵ The Gender Action Plan (GAP) III is also the general framework for the regional programmes: the regional programmes for Asia-Pacific (EC 2021b), for Americas and the Caribbean (EC 2021c), as well as on sub-Saharan Africa seem (EC 2021d), on paper at least, to mainstream gender equality throughout its sectoral components.

The GAP III combines gender mainstreaming, targeted actions and political dialogue to promote its objectives. Recent EDCPM research suggests that more efforts are needed to make the GAP III a document of reference for the whole of EU external action, beyond its development cooperation, and to strengthen its uptake by EU member states (Di Ciommo 2021). This also regards building better synergies between the GAP III and the WPS agenda. This section aims at assessing how gender equality has been addressed respectively in the MIPs and the TEIs.

1.3.1. Gender in the MIPs

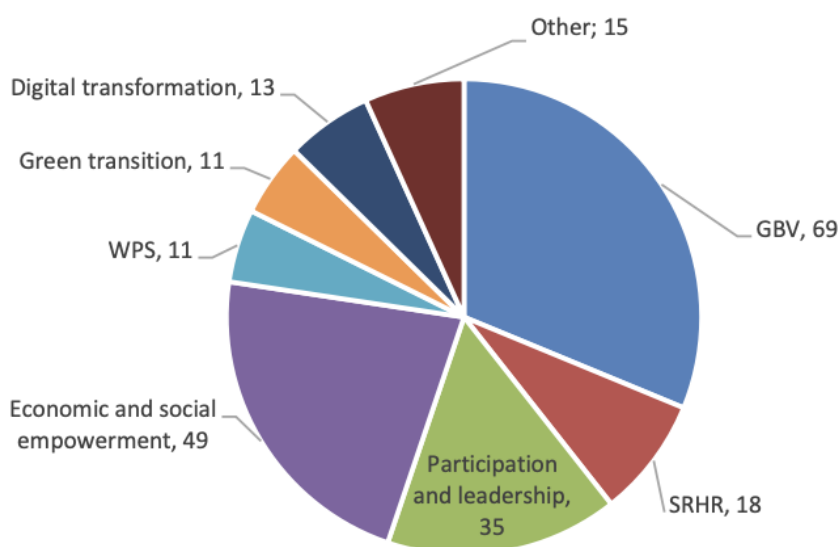
The NDICI-Global Europe regulation sets out a gender target applicable across the instrument for all the actions included in the geographic and thematic programmes, and the programming guidelines sent to EU delegations. At least 85% of new actions should have GEWE as a primary or significant objective, and at least 5% of these measures should have gender equality and women's and girls' rights, and empowerment as a principal objective. The gender target has been integrated in the programming process which required that each EU delegation had to programme at least one gender-targeted funded action in the MIP (EC 2021a, unpublished).

The EU external action report for the implementation of the external action instruments 2021 provides interesting analyses on the links between the GAP III and the programmes as it includes an annex on the results of the implementation of the Gender Action Plan III (EU 2022). The report states that total commitments are at €9 263 million in 2021 and that 70% of new actions of the Commission's external actions, including DG INTPA (84%), DG NEAR (75%) and the FPI (43%) have contributed to mainstream and target gender. The report also indicates that *"four percent of actions committed in 2021 have gender equality as their principal objective"* (EU 2022). These data suggest that the integration of gender equality in the NDICI-Global Europe programmes seems to be on track. However, the data available are based on an analysis of the MIPs and consistent and comprehensive integration of gender equality in EU programmes at the implementation level in the remainder of the period will be essential.

A new feature of GAP III, the country-level implementation plans (CLIPs) are meant to ensure the trickling down and integration of GAP III general priorities at country level. They have been designed alongside the programming of the NDICI-Global Europe to ensure synergies, although with different degrees of success (Teevan et al. 2021). This ensures a certain degree of differentiation across countries, but also a more systematic mainstreaming of gender equality in EU actions, including through the NDICI-Global Europe. The report on the first year of implementation of the GAP III also shows that at least one gender-targeted action was foreseen in 120 CLIPs and 13 regional actions (EU 2022). The first analyses of the CLIPs also show to which extent gender equality has been mainstreamed so far.

⁵ See EDCPM publication on 'Gender and the Women, Peace and Security Agenda in EU external action' (Di Ciommo et al. forthcoming).

Figure 1: Number of planned actions where gender is a principal objective for 2021-2025, by key area of engagement (as indicated in the CLIPs)



Source: EU 2022

1.3.2. Gender in the TEIs

Available data at this point suggest that the TEIs do not seem to prove the same effort of systematically mainstreaming gender. Apart from the EU gender targets which apply to the EU-funded part of the TEIs, there are no overall targets at the level of TEIs for other TE members. Hence, the level of ambition to mainstream gender in TEIs depends on the willingness of other participating actors. Yet, TEIs bring opportunities for more coordinated actions on gender equality.

For now, only 4 TEIs focus on gender specifically: one regional TEI on sexual and reproductive health and rights (SRHR) in sub-Saharan Africa, in line with the African Union (AU)'s commitment to implement the Maputo protocol⁶ (AU 2016), and three country-level TEIs in Morocco, Sudan and Zimbabwe. Some other TEIs (10 at country level, 3 at regional level) also refer to the GAP III and the CLIPs. Seven countries⁷ have a joint programming document, and all seven integrate the GAP III objectives (EU 2022).

According to the GAP III implementation report for 2021, at least 52 TEIs incorporated the GAP III objectives (EU 2022). A forthcoming ECDPM paper indicates that out of 126 TEIs assessed by the EC, 7 have a strong focus on gender equality, 41 contain at least one action targeting gender and mention gender at least once. In 49 cases, gender is not referred to, but there are indications of gender mainstreaming, for instance in the intervention logic. Finally, 29 TEIs do not target gender or include gender (Di Ciommo et al. 2023 forthcoming).

⁶ The Maputo protocol is the African Charter on Human and Peoples' Rights on the Rights of Women in Africa, established by the AU in 2005.

⁷ Djibouti, Ecuador, Ghana, Laos, Mali, Senegal and Togo.

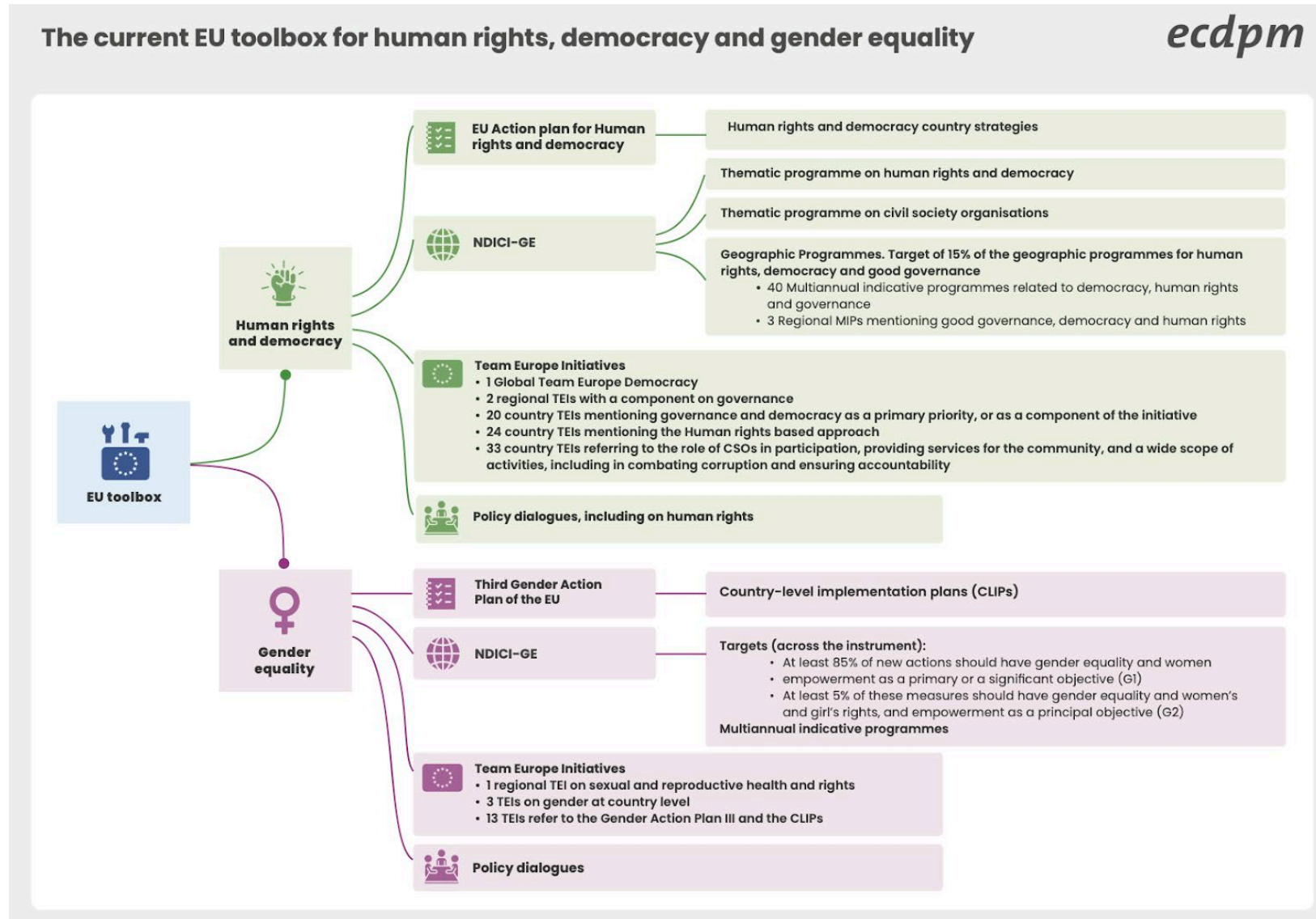
Box 2: A regional initiative on SRHR in sub-Saharan Africa

A regional [TEI](#) has been designed for the sub-Saharan African region, on [SRHR](#). Often presented as a good practice, this TEI seems to tick all the boxes as it results from an “*inclusive, transparent, participatory, deliberate*” process, according to a stakeholder interviewed during the research. It also sets a framework to allow better coordination of the policy dialogue between the EU and the African stakeholders. And it helps by bridging the gap towards long-term strategic planning in this topic, beyond the political commitment made by the African regional actors.

The TEI was built in coherence with the commitments made by the AU through the Maputo protocol. One question behind that TEI was to find an accurate way for the EU and its member states to align with the AU’s agenda. Moreover, the European stakeholders needed to pull together resources to allow good coordination.

The coordination role is taken on by the Swedish Embassy in South Africa, to ensure coherence among the EU activities and the member states taking part in this initiative: Belgium, Czechia, Finland, France, Germany, Luxembourg, Netherlands, Portugal, Spain, and Sweden. Each member state should complement the 60 million euro EU contribution. In the design process of the TEI, civil society was consulted.

Figure 2: The current EU toolbox for human rights, democracy and gender equality



Source: ECDPM, based on the data available between October and December 2022

2. Enhancing the promotion of human rights, democracy and gender equality through and beyond the NDICI-Global Europe

Firstly, this section asks whether mainstreaming and conditionality are the right tools to promote democracy, human rights and gender equality in EU external action through the NDICI-Global Europe. Secondly, the section looks into different processes and tools linked to democracy, human rights and gender equality, and the synergies among them. Thirdly, we look at the TE approach as a way to enhance joint action across the EU and member states on these topics. Finally, we look at the importance of involving other stakeholders in order to strengthen ownership.

2.1. Reflecting and combining approaches of targeted actions, mainstreaming and conditionalities

Gender mainstreaming and a HRBA to development cooperation are central to the way the EU promotes democracy, human rights and gender equality through the NDICI-Global Europe. Conditionality and incentive-based approaches are also increasingly being used in recent years by the EU as a way to reaffirm Europe's standing on human rights and democratic principles globally. However, these mechanisms have not always proven as effective as intended.

2.1.1. Strengthening the EU's mainstreaming approach

Gender mainstreaming and the HRBA implies the integration of either a gender perspective or international human rights standards and principles in development activities, without necessarily making them a principal or exclusive objective of interventions.

While mainstreaming is essential to ensure that the analysis, design and monitoring of policies and interventions integrate gender equality and human rights, a question is whether it is the most efficient manner to promote and advance values in EU international and development cooperation. Mainstreaming has been used as a transformative approach and a systematic methodological tool to incorporate horizontal priorities, but the risk is that these get diluted into bigger programmes.

Concerns have been raised that gender mainstreaming lacks prioritisation that may result in a simple tick-the-box exercise and a dilution of the gender agenda (Teevan et al. 2021), or that it risks not being translated in practice unless it is linked to and accompanied by specific measures and dedicated funding for more targeted actions. The GAP III aims to strengthen the implementation of mainstreaming commitments by combining it with dedicated actions and gender policy dialogues.

In parallel, the NDICI-Global Europe reaffirms the commitments of the EU and its member states in the European Consensus for Development to apply a HRBA to development cooperation. The EU's toolbox was recently renewed, to "*put human rights and the rights-holders at the centre of EU external action*" (EC 2021g). In practice, the HRBA presents five principles that "*should be rigorously applied throughout programming, design and implementation and across all sectors*": (1) applying all human rights for all; (2) meaningful and inclusive participation and access to decision-making; (3) non-discrimination and equality; (4) accountability and rule of law for all; and (5) transparency and access to information supported by disaggregated data (EC 2021g). The HRBA requires consultation and dialogue with the different stakeholders, including through a conflict-sensitive approach ([Sida](#)).

The ECA's annual report on the performance of the EU budget in 2021 (ECA 2022a) focused on the mainstreaming of horizontal policy priorities into the EU budget. It found that **improvements are needed in the way the EU anchors overarching policy priorities in the EU budget, particularly when it comes to gender equality and gender**

mainstreaming (ECA 2021). The report finds that gender equality was the least well-integrated horizontal priority of the EU into a selection of programmes, including the NDICI-Global Europe. The Court points out the need for the Commission to strengthen its mainstreaming practice, in particular when it comes to incorporating the policy priorities into the performance framework. (ECA 2022b).

The difficulties of mainstreaming human rights and gender equality in a consistent manner, as well as the challenges to measure the results and impact of this approach, call for increased sharing of lessons learned and good practices between the EU and its member states. An honest reflection and debate around the pros and cons of mainstreaming would also prove useful. Additionally, gender mainstreaming and the HRBA that underpins the implementation of the external action of the EU should be combined (EC 2021g).

2.1.2. Growing use of conditionality, incentives and a ‘more for more’ approach

A broader debate among EU stakeholders on the promotion of democracy, human rights and gender equality in its programmes of external action is whether and the extent to which the EU should condition its support to the partner country’s alignment on these values and principles.

While the value and effectiveness of political conditionality of aid has been questioned and long debated (Vanheukelom 2013), **it is increasingly and more openly put on the table by EU decision-makers in recent years as a way to reaffirm Europe’s standing on human rights and democratic principles globally.** The Development Committee of the European Parliament has recently called for *“more effective and serious efforts in applying the “less for less” principle in relation to third countries which display a manifest disregard for human rights and international law, and to adapt the level and intensity of EU engagement accordingly, notably in terms of development cooperation, trade benefits and access to EU programmes, and to use when appropriate NDICI-Global Europe provisions regarding the suspension of assistance”* (EP 2023a).

The conditionality starts applying to the programmes already at an early stage: a multiannual indicative programme can be signed only with countries where there has been an agreement between the partner countries and the EU precisely on values such as gender equality, human rights or democracy. An assessment of the situation of human rights, democracy and gender equality is made before engaging in a budget support programme. In such cases where the dialogue on human rights and/or gender did not allow the EU and the partner countries to find an agreement on such topics, the MIPs were not finalised yet. This is the case, for instance, in Afghanistan, Ethiopia, and Eritrea, where temporary measures permit the EU to carry on with cooperation activities, while negotiations of the country-level MIPs go on with the governments. The suspension of the implementation of the programme can be decided if a breach of human rights on the ground is noticed, as was recently the case in Ethiopia (Reuters 2021).

Since 2015, the EU Neighbourhood policy applies the ‘more for more’ principle as an incentive-based approach, rewarding the progress made towards democratic reforms. In the previous MFF (2014-2020), €1.4 billion was spent under this incentive-based approach enclosed in the European Neighbourhood Instrument’s regulation. Similarly, a less-for-less approach is implemented in cases where the jointly set objectives in terms of democracy, human rights and democracy are not met by the governments of the partner countries. In those cases, the funds are reallocated to CSOs, as happened in Belarus (EC).

Through the **Generalised Scheme of Preferences** in its trade policy, the EU also applies a system of positive and negative conditionality and includes the possibility to remove trade preferences in cases of serious and systematic violations of human and labour rights. The recent proposal for a new EU scheme of generalised tariff preferences foresees a strengthening of positive and negative conditionalities, including a special incentive arrangement for sustainable development and good governance.

This incentive-based approach is now integrated as a principle in the NDICI-Global Europe regulation (article 8). Except for the “*support to civil society, conflict prevention and peacebuilding, people-to-people contacts, including cooperation between local authorities, support for the improvement of human rights or crisis-related support measures*”, the more-for-more and less-for-less principles shall apply, based on the performance and progress on matters related to democracy, good governance, rule of law, relations with civil society, human rights, including gender equality (article 20).

Some key questions and lessons learnt can be drawn from the incentive-based tools used to promote democracy, human rights and gender (Van der Loo 2022; Youngs et al. 2023). Overall, the latter have not proven as effective as intended, particularly in the Southern Neighbourhood, and have been applied inconsistently (Gomez Isa and Muñoz Nogal 2016). Democratic reforms cannot be bought and the promotion of universal values and rights has to be fully owned in order to be effectively and meaningfully implemented afterwards. To do so, the EU has to strengthen synergies between its financial instruments and its various policy and political processes and tools.

2.2. Strengthening synergies between EU policy processes and tools

The need for synergies has increased with the ‘policy first’ principle. The latter implies a more strategic approach of the EU external action and a stronger political framing around EU interests and values. It requires greater coordination among the EU institutions’ stakeholders, namely between Brussels’ headquarters (DG INTPA and EEAS) and the EU delegations on the one hand, and also between cooperation and political sections or institutions on the other hand.

2.2.1. Linkages between NDICI-Global Europe, the EU Action Plan on Human Rights and Democracy and the Gender Action Plan

Multiannual indicative programmes are key documents to frame the action of the EU, as they set the general priorities for cooperation with the country. But a different and broader perspective needs to be taken, as the promotion of democracy, human rights and gender equality goes beyond the actions funded under the NDICI-Global Europe.

Beyond the NDICI-Global Europe and TEIs, the EU Action Plan on Human Rights and Democracy 2020-2024 provides the EU with a political frame for its action on human rights and democracy.

The mid-term review (MTR) of the EU Action Plan on Human Rights and Democracy will be finalised in March/April 2023 and will lay the groundwork for the next EU action plan. At the country level, human rights and democracy country strategies are developed by EU delegations based on an analysis of the human rights situation in the country. They are endorsed by the member states and lay down the European approach in terms of human rights at the national level. Making sure that the human rights and democracy country strategies are endorsed and implemented by the EU and by the member states is a condition for their success. These strategic documents are not public and we could not access them in the course of our research, although it would have been relevant to put them in perspective and analyse under which conditions they can thrive in implementing the EU agenda on human rights and democracy. Transparently reporting on activities related to human rights and democracy gives better visibility of the member states’ and the EU’s actions in that regard. Progress towards implementing the Action Plan is evaluated annually in the High Representative for Foreign Affairs and Security Policy of the EU and Vice-President of the EC’s report on human rights and democracy around the world, including some brief country updates with an overview of the situation of human rights and democracy and of the EU financial and political engagement at national level (EEAS 2022).

Promoting gender equality throughout the EC’s actions is one of the priorities of Article 8 of the Treaty on the Functioning of the European Union (TFEU): this goes beyond the external actions. The GAP III goes a step further than its predecessors, as it also aims to enshrine GEWE throughout EU external action, combining gender mainstreaming, standalone and targeted projects and programmes, and policy or political dialogue (Teevan et al. 2021). As previously explained, GAP III and the CLIPs are complementary and referred to as a specific set of objectives and actions in the programmes. The CLIPs should also result from a broad collaboration and joint effort of the whole EU delegations, including the political and trade section, as well as the cooperation one. Moreover, the CLIPs and MIPs priorities are not necessarily aligned, as shown in another ECDPM study (Di Ciommo 2021). Even though the Council did not adopt conclusions to endorse the Gender Action Plan III in 2020, GAP III is a document of relevance also for EU member states and it aims to create synergies between the EU and member states’ actions on gender at country level. Respective EU delegations and member states involved have to feed back on their activities to mainstream gender equality and women empowerment according to the CLIP.

Beyond the NDICI-Global Europe, the reporting processes of the TEIs, the GAP, and the Human Rights and Democracy Action Plan should be seen as complementary. As mentioned earlier, the multiplication of targets and priorities is a good way to strengthen the political agenda, but it complexifies the reporting exercises and the readability and visibility of the results. The respective markers on human rights, democracy and gender are potentially useful to measure change, if an input-based approach is complemented by some strengthened and harmonised reporting mechanisms by the EU stakeholders. This will, of course, not be sufficient as a lot relies also on the partner country’s own tools set to measure the impact of external aid on its objectives and priorities. Nevertheless, on the EU side, our study shows the need to harmonise the reporting and evaluation mechanisms, and to find or build more synergies between the various processes on the NDICI-Global Europe (including through the Global Europe Performance Framework), the TEIs, the GAP III and the Action Plan for Human Rights and Democracy.

2.2.2. Policy dialogues

Policy dialogue is central to EU development cooperation and seen as essential to promote democratic principles and good governance, especially in the framework of EU budget support to partner countries.

The policy dialogues are a good example of space where coordination should be strengthened. The GAP III and the EU Action Plan on Human Rights and Democracy, as well as their country-level adaptations, constitute the frame of the policy dialogues led by the EU at country level. The GAP III foresees for instance that all EU delegations should engage in at least one high-level dialogue on GEWE with institutional actors per year per country. According to the latest report, 83% of EU delegations engaged in policy dialogue with institutional actors with reference to GEWE, though the quality of those dialogues and the follow-up is uneven (EU 2022; Teevan et al. 2021). The first year of implementation of the GAP III shows that at least one dialogue per year has been organised with civil society on WPS in 27% of relevant countries, and on GEWE in 77% of the countries (EU 2022).

In some countries (see Table 2), human rights dialogues are being conducted in a high-level format. According to the Guidelines on human rights dialogues, they “*need to be used effectively in conjunction and synergy with other instruments (political dialogues, public diplomacy, demarches, cooperation programmes and projects, support to civil society, election monitoring) to promote the EU’s human rights priorities and objectives*” (EEAS 2021a). For now, these dialogues are not as developed in Africa, Latin America and Asia as they are in the EU Neighbourhood area: out of 54 countries, the EU engaged human rights dialogues only with Guinea Bissau and South Africa, as well as with the AU as an organisation.

In the EU Neighbourhood area, for instance, the policy dialogue was enshrined in the partnership with the EU very early on. For a long time, it has constituted the very core of the discussion with the 16 Neighbourhood countries,

especially because the partnerships were built more on political objectives than on development cooperation ones (EC 2018): promoting good governance, democracy, rule of law and human rights as key EU interests has been one of the three priorities of the European Neighbourhood Policy. Under the same NDICI-Global Europe umbrella, the Neighbourhood and development policies are now becoming closer and can benefit more from each other’s history. Conducting substantial and regular human rights dialogues with the partner countries is one of them.

Table 2: Human rights dialogues

Neighbourhood and central Asia	Armenia, Moldova, Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan
Africa	AU, Guinea Bissau, South Africa
Arabian Peninsula	Bahrain, Kuwait, Oman, Qatar, Saudi Arabia
Asia	China, India, Indonesia, Laos, Mongolia, Myanmar, Vietnam
Latin America and the Caribbean	Cuba, Brazil, Colombia, Ecuador, Mexico
“Specific sub-committees or groups dealing with human rights”	Morocco, Tunisia, Lebanon, Jordan, Egypt and Iraq
Consultations on HR	United States, Canada, Japan, candidate countries (Albania, Moldova, Montenegro, North Macedonia, Serbia, Turkey, Ukraine)

Source: EEAS 2021b and EEAS 2021a

Box 3: Fine-tuning the narrative on democracy

The EU’s political interest towards democracy is growing (Ronceray and Sergejeff 2023). In her address to the Summit for democracy, Commission’s President Von der Leyen referred to democracy as an overarching common good. Democracy is also identified as the *“fairest way to deliver the greatest benefits to people around the world, creating societies that are equal and allow equal opportunities”* (EC 2021h). More recently, in her 2022 State of the Union Address, President Von der Leyen also links democracy to the independence of the judiciary and the rule of law (EC 2022a) while she launches a defence of democracy package, insisting on the need to remain credible when the EU asks partner countries to strengthen their democracies.

This message is not reflected as vigorously in the strategic and operational documents of the EU external action. In particular, a stronger narrative on democracy itself is missing (International IDEA 2023). Be it the action plan for human rights and democracy, the NDICI-Global Europe regulation and its delegated regulation, or the programming and action documents at country level, democracy is, most of the time, associated with another priority or sector. In a way, the EU agenda on democracy seems to be diluted into the field of governance (be it qualified as good or as democratic), or merged with the human rights one. It could benefit from being put forward *“as a key driver, enabler and objective of all EU external policies”* (International IDEA 2023).

While fine-tuning the narrative regarding the promotion of democracy in its external action, the EU should also reflect on how these messages on democracy are delivered. In a worsening context for democracy promotion and support, the EU narrative should be humble and done through a reciprocal dialogue with partner countries in order to avoid an ‘us versus them’ sentiment. This would allow approaching sensitive matters with more humility and honesty, looking at shared challenges as equal partners.

EU delegations play a central role in leading these key policy dialogues with partner countries. The whole delegation should engage on the topics: the political section in charge of following the human rights files, the gender focal point, as well as the more operational section following the sectors, in which human rights and gender are to be mainstreamed. For example, human rights and gender are also supposed to be mainstreamed throughout ad hoc chapters in trade agreements. This requires the involvement of the political section, who negotiate the agreement, and the cooperation section, who will implement programmes in line with it. Yet, collaboration and exchanges between the cooperation section and the political section at the EU delegations' level are often not optimal and should be improved. Additionally, the senior management and political leadership of the delegation also need to engage regularly on those priorities.

2.3. Strengthening the Team Europe approach to advance principles and values

One of the goals of TE is to enhance Europe's leadership and influence in the world, including the promotion of EU's interests and values. The TE approach can thus play an important role by bringing together the EU and the member states on common values and approaches, speaking with one voice and improving European leverage in political and policy dialogue on gender equality, human rights and democracy.

2.3.1. Joint policy dialogues at country level

Efficient policy dialogues require as much alignment as possible within the European family. On that ground, discussions on human rights and democracy with partner countries ought to involve the EU and the member states, to ensure synergies and crossed opportunities as well as a shared and as comprehensive as possible understanding of the context. Speaking with one voice in the policy dialogues with the partner countries is key to ensuring coherence, visibility and impact of the European approach.

The TEIs encourage joint policy dialogues with partner countries and regions in the broad areas covered by the TEIs, but do not provide any framework to do so, nor do they provide clear mechanisms or an obligation to report on how TEIs contribute to advancing gender equality, democracy and human rights. In general, member states are invited to participate in the human rights dialogue sessions conducted by the EU with the partner countries. The GAP III also mandates the EU and its member states to integrate gender equality into their political dialogues.

On the partner country's side, the TE approach or initiatives can be perceived as an internal mechanism, with no or low impact on their reality. Hence, one challenge is for the TE approach to find a *raison d'être* on the ground that would go beyond the coordination of activities at country level. In that sense, the human rights dialogues, and more generally the policy dialogues, are an opportunity for the EU and the member states to speak with one voice.

One challenge for member states and the EU delegations is often the resources available in a diplomatic mission for policy work and coordination efforts. The TE approach is a way to join forces and rely on each other's capacity and resources (in terms of staff and finance) on the various topics to be addressed, including democracy, gender and human rights. This would fill the capacity gap that is sometimes encountered either by member states or the EU delegations, or both.

Adequate resources should be transferred to the EU delegations to allow them to seriously play that role of coordination among EU stakeholders at country level on those key topics. While the EU and some member states improved the ways in which they engage with local actors in support of political reform, they do not necessarily have the right tools to engage more and quicker with these countries when it comes to seize the opportunities open by some "democratic openings" (Godfrey 2022).

There is a need to better structure the policy and political dialogue that takes place in partner countries, especially in fragile political contexts. The TE approach and TEIs can strengthen joint policy and political dialogue. Yet, the extent to which individual TEIs address human rights, democracy or gender equality at country level, and then globally, is done on a case-by-case approach. The political dialogue in the context of TEIs is often ad hoc and dependent on the (personal) engagement of those MS present in the field. More structured dialogues at all levels and involving all TE members should thus be further encouraged, as well as the linkages to other longer-term processes such as joint programming.

Box 4: Zambia - between joint programming and the TE approach

The EU's 2021-2027 multiannual indicative programme for Zambia presents a set of 3 broad priorities, which are (1) "green partnerships for sustainable recovery, growth and decent jobs"; (2) "supporting the people of Zambia to reach their potential and build resilience"; and (3) "fair, inclusive and peaceful society" (EC 2021i). The MIP was drafted in an inclusive manner, involving member states at all stages. The 3 priority areas align with the Zambian eighth National Development Plan (Republic of Zambia 2022) and its commitment to principles of good governance, as well as the EU's 2020-2024 Global Action Plan for Human Rights and Democracy. The third priority area of the MIP set more specifically two objectives: (1) "promoting human rights and improving the democratic space for citizens in Zambia" and (2) "supporting public sector reform for improved delivery of public services and domestic accountability".

In Zambia, a change of government occurred in August 2021. The new President appears to be much more in favour of reforms and open to advance many topics linked to universal values. Zambia represents an ally in the region and there is optimism around issues of governance and anti-corruption, as well as transition to a green economy. Nevertheless, some topics remain sensitive, such as corruption and the situation of LGBTQi community.

Politically, the exchanges between the EU and the Zambian leaders are dynamic: the new Prime Minister met with President Michel four times, with Commissioner Urpilainen twice, and with President Van der Leyen once. There is also a regular policy dialogue at high level. At technical level, the dialogue is set but uneven, as it depends on the sectors involved. Member states present in Zambia and the EU are all involved in the policy dialogue exercise with the Zambian counterparts

Among EU partners present and active in Zambia, a [joint programming strategy](#) was initiated and then adopted for the period 2017-2021. An updated 'Joint European Strategy for Development Cooperation with Zambia' is about to be approved for 2021-2027. The joint programming exercise was the basis of the TEIs proposals. The joint programming strategy has also been adopted by one member state as constituting its own country-level strategy.

TEIs were proposed from the bottom up by the 'EU 4': the EU delegation, Sweden, Italy, and Germany, who are the most active EU actors in the country. France, Czech Republic, and Finland are also represented in Zambia but do not implement cooperation programmes. One TEI on [human development](#) includes a component on SRHR, as well as one on justice, which has rule of law and human rights as priority areas. Another TEI focuses more on the green transition, which aims at joining the initiative on biodiversity in Africa.

2.3.2. Reporting on TEIs: Between flexibility and impact

Since the TEIs represent a large share of the total EU funding for partner countries, they are a key tool for delivery on the targets, aims and benchmarks of the NDICI-Global Europe. The reporting process on TEIs is of key importance to ensure that it not only captures the EU contributions but also those of the other participating TE members.

While the activities funded by the EU programmes are closely monitored and will be part of the annual report of the EC for its external action, including the ones that are part of a TEI, this is not necessarily the case for the other TE members. **The figures presented annually by the EC on the implementation of the EU external action instruments only concern the EU funding and the extent to which the targets are achieved through EU-funded actions.** The blind spot comes from the other European stakeholders involved in TEIs: the latter do not oblige the EU member states, nor their agencies or financial institutions in the same way as the EU. Yet, these actors play a crucial role in TEIs, including in terms of the promotion of human rights or values. Hence, their contributions should be accounted for and taken into consideration when assessing the results and broader impact of TEIs on the promotion of human rights and values.

The light and flexible approach of TEIs is one of its key features and reasons for success. In order to get the buy-in and participation of member states, the governance of the TEIs is non-binding and adaptable to the realities and constraints on the ground, and this also concerns the monitoring and reporting. To ensure flexibility of the governance and reporting process, the members of a TEI are invited to select indicators to report on (Jones and Sergejeff 2022). As a consequence, the EU and member states can agree on a case-by-case approach on some indicators they want to report on. Gender, democracy and human rights may not be part of those. There is no insurance, and little chance - unless all TE members in a given TEI agree - that democracy, human rights, and gender will be systematically chosen as indicators. Hence, the assessment of the contribution of TEIs to the advancement of human rights, democracy or gender will be challenging and some questions remain open regarding the reporting of the activities funded by the member states (including agencies, European Development Finance Institutions [EDFI], European Investment Bank [EIB], and European Bank for Reconstruction and Development [EBRD]) under the TEIs.

The institution of a common reporting process on TEIs is still in its infancy and largely built on the respective procedures and practices of the individual TE members (Jones and Sergejeff 2022.). Any future common reporting framework should include all actors and ensure the systematic monitoring and assessment of the overall contribution of TEIs to the advancement of human rights and values, including for those TEIs for which these are not the primary focus.

2.4. Ensuring more ownership by broadening the diversity of stakeholders at the table

The scope of ownership goes beyond the central government and should include all stakeholders. EU support on democracy, human rights and gender is generally more effective and impactful in countries where the national stakeholders and decision-makers are committed and engaged - the buy-in of all society is often a pre-condition (Damen 2022). Where the political will of the partner country's government to promote democracy, human rights and gender equality is not very strong, the EU has to work more closely with local authorities (LAs), civil society and the private sector. These actors are key partners when it comes to promoting democracy, human rights and gender equality and ensuring that these principles are tackled and implemented in a meaningful, long-term sustainable manner.

2.4.1. Strengthening the participation of civil society organisations and local authorities

While the NDICI-Global Europe regulation and programming guidelines made the consultations mandatory, the process seems to remain timid and the instructions vague. Globally, the EC's 2022 annual report on external action instruments (EU 2022) indicates that the priorities of the MIPs were identified following "*consultations with the relevant partners' authorities and through a real 'Team Europe' approach*". From the data available for the first year of the NDICI-Global Europe's implementation, it is, however, difficult to assess the process of consultation and the extent to which they were inclusive.⁸

Including CSOs and LAs in the policy dialogue is a first step towards a more regular and meaningful engagement with them. Additionally, when it comes to engaging politically with CSOs and LAs, given the new orientations of the programmes and the clear shift in decision-making towards more autonomy for the EU delegations, consultations of CSOs and LAs need to be strengthened and structured at country level.

The EU delegations have certain flexibility in choosing how to organise those consultations, "*building on existing coordination mechanisms*" (EC 2021a unpublished). **The role of the EU delegations is thus crucial in ensuring that these consultation processes and mechanisms are adapted to the local realities and existing mechanisms.** To allow a meaningful and timely consultation of non-state actors, and ensure local ownership, EU delegations should receive adequate resources, expertise and incentives.

Some tools to engage with CSOs and LAs already exist, but need to be further developed. To ensure an inclusive process, the consulted organisations should reflect the diversity of the partner country. The roadmaps for the engagement with civil society are an interesting tool to map the support to CSOs, and also provide the EU stakeholders with some strategic priorities in their engagement with CSOs. In 2019/2020, it was also experimented with by LAs and four pilot countries benefited from roadmaps (Gutiérrez 2021). Additionally, European and global networks of CSOs and LAs benefit from framework partnership agreements with the EU institutions.

Some platforms and spaces have been set over the years at global and European level to this end. For instance, the Policy Forum on Development (PFD) was established in November 2013 as a result of the structured dialogue to engage with CSOs and LAs following EC Communications of 2012 and 2013 (EC 2012 and EC 20213). As a result of the COVID-19 outbreak and implied sanitary limitations, the PFD has started organising more virtual consultations, both globally and as a regional forum as it was meant to from its charter's provisions. Additionally, it recently started to reflect on how to jointly build the consultations agenda, so that CSOs and LAs can also be driving the process. This is going into a more inclusive and broad consultation process with CSOs and LAs, which is also crucial at country level. The challenge would be to set a similar consultation mechanism at country level, mostly depending on the existing structures, to avoid overlap and duplication.

In some countries, it is difficult for non-governmental organisations and local and regional governments to access the EU delegations when they do not have an ongoing EU-funded project. Such contacts should be encouraged and facilitated in order to ensure good communication between the representatives of the EU and the partner countries' stakeholders. The role of a dedicated focal person is key in order to create, nurture and use some spaces of dialogue with the local and regional decision-makers, the grassroots organisations and the private sector, which would, additionally, create the conditions for a dynamic and long-term multi-stakeholder approach. The GAP III first-year implementation report states that 236 gender focal persons are in place at headquarters (of which 65% have their role included in their job description), and 141 in EU delegations (of which 37.5% have their role included in their job description), all in charge to support the integration of a gender perspective in EU policies, interventions and dialogues. Similarly, **focal persons for CSOs and LAs** exist, who are not necessarily the same person, nor the person

⁸ A study is being conducted internally by DG INTPA regarding the consultations of CSOS throughout the programming and implementation of the instruments.

in charge of the governance sector. **Their role should be systematically made public and given more visibility to allow an accessible entry point for local stakeholders to engage with EU delegations.**

The ownership principle implies consulting with the partner country's governments on the priorities, but also on the modalities used to achieve the shared goals. **To allow the CSOs and LAs to grow as implementing partners, the tools to support them also need to be appropriate and adapted to the realities of the smaller partners.** Indeed, the modalities might need to be adapted to the new geographic turn taken by the NDICI-Global Europe, which changes the way the EU funding is delivered. Now, more than 75% of the funds are channelled through geographic programmes, mostly at country level. On the one hand, the modalities usually in place at EU delegation level hardly match this type of organisation's limits, as they have in general less capacity and sometimes smaller political leverage. CSOs and LAs cannot be supported by the EU in the same way as the central governments are, although they contribute to democracy, human rights and gender equality as well. On the other hand, EU delegations often lack support, expertise and/or resources in engaging with CSOs and LAs. In the previous programming period, more funds could be channelled through CSOs and LAs. In the 2021-2027 multiannual financial framework, the thematic programme for CSOs amounts to around €1.5 billion. **In the geographic programmes, the place of CSOs and LAs seems unclear, both in terms of political support and in terms of funding.**

The changes introduced by the NDICI-Global Europe regulation on the modalities of cooperation induce more indirect management, benefiting the development of financial institutions as well as member states' cooperation agencies and UN agencies. Yet, the modalities should be better adapted to the realities on the ground, to make sure that local decision-making bodies/institutions as well as grassroots organisations can also benefit from the EU-funded programmes: budget support only targets central governments, procurement and consortium agreements benefit big EU-based companies and MS agencies, calls for proposals are amounted with too big envelopes and cannot benefit grassroots organisations. Adapting these modalities to a different scale would also contribute to better implementation of the ownership principle.

2.4.2. Engaging with the private sector is also crucial

Using the EU funds as leverage to encourage more private investments is one key challenge of the GG strategy while ensuring that these investments support democracy, human rights and gender equality. Investments attracted cannot be sustainable if they are not owned by LAs and communities.

The gender and human rights dimension is integrated in the objective of the NDICI's European Fund for Sustainable Development Plus (EFSD+), which is in line with the policy-first principle. This dimension is also integrated in the ex-ante assessment of the investments to ensure that they do no harm and/or contribute to human rights; in the implementation of the investment; and the monitoring and reporting aspects. Moreover, the EIB, the EBRD, and the EDFI also integrate a gender and human rights dimension in their own investments, beyond the EFSD+.

The GG strategy aims to leverage investments for global infrastructure development, according to some key principles: democratic values and high standards, good governance and transparency, equal partnerships, green and clean, security-focused, and catalysing private sector investment. On paper, its narrative doesn't suggest any contradiction between the EU programmes' strong priority set on the infrastructures and the promotion of gender, human rights and democracy, which are also at the heart of the EU's offer. The GG governance setup provides a mechanism to engage with the private sector: the business advisory group. This business advisory group should also be used to make sure that investments under the GG are not only aligned with the EU's policy priorities but that they are also supportive of human rights, democracy and gender equality and respect social and environmental standards.

Seeking the private sector's contribution also requires working on the regulatory environment at all levels: in the EU for EU-based companies to respect certain standards, even in their interventions outside the EU, especially if they

use EU funds or complement EU funds; but also outside EU borders to create a positive business climate in the partner countries.

In 2022, the EC adopted a proposal (EC 2022b) that should lead to new legislation on corporate sustainability due diligence (EP 2023b). Applicable to the EU-based companies, the directive would require them to assess the compatibility of their activities with human rights. Their investments beyond the EU's borders would also have to answer to the directive's provisions, including the *"rules on obligations of due diligence by companies regarding actual and potential human rights and environmental adverse impact"*. It also sets out the obligation for the member states to set the legal framework and enforce the directive accordingly. Moreover, following our exchanges with DG INTPA, it appears that some internal reflections in the Commission are taking place on how to further implement the HRBA in the programmes and activities in relation to the private sector or dealing with the due diligence strategy and the investment plans.

Since 2019, the global partnership for effective development cooperation has started to integrate this dimension in the aid effectiveness agenda, notably through the Kampala principles on effective private sector engagement in development cooperation (GPEDC 2019), be it through finance, policy dialogue, capacity development, technical assistance, knowledge sharing and research. Lastly, in the particular case of companies receiving funding from the EC, the private sector needs to abide by social, environmental and fiscal standards, including respect for human and indigenous rights, for instance (EC 2014). Yet, while EU-based companies have to respect certain standards, their competitors are bound to the national legislation of the country in which they are operating. The ownership principle is at stake here, as the local, regional and national authorities need to be closely associated in the discussions around the public-private partnerships. A question is then how can the EU accompany the partner countries in building legislation that enables companies to operate while providing a framework of action coping with democracy, human rights and gender standards. The EU should encourage the inclusion of all relevant stakeholders in that regard too. In this context, a reflection on the engagement towards the private sector is needed, especially in view of the forthcoming application of the corporate sustainability due diligence directive in member states, which will have an impact on their companies' practice. How are the values reflected in their investments (supported by the EU-funded projects/programmes, used as leverage in most cases)? Can the companies' contribution to the priorities of the EU in partner countries be assessed? How can the private sector reflect the EU values in their partnerships and trade relations?

With countries most advanced on owning the agenda on democracy, human rights, and gender, encourage them to expand the agenda to the relationships with the private sector.

3. Conclusions and recommendations

The EU is committed to promoting gender equality, human rights, and democracy, as well as the principle of ownership in the framework of its development and international cooperation. According to the overall preliminary assessment based on existing MIPs and TEIs, human rights and democracy, as well as gender equality were successfully integrated in the policy dialogue and the preparation of the MIPs. The EU seems to be on track to meet set targets on gender equality and human rights as per the NDICI-Global Europe regulation based on the MIPs and TEIs. Yet, this preliminary assessment needs to be confirmed and operationalised. The extent to which the annual action plans will effectively translate MIPs into concrete actions and achieve the targets therein will be the determining factor. In doing so, the EU and member states should ensure that these principles and values continue receiving the necessary level of funding and political support in order to strengthen their prominence moving forward.

The MTR of the NDICI-Global Europe constitutes an important opportunity to take stock of progress made in the first years of implementation as well as to readjust programmes and reallocate funds across countries/regions as appropriate, for the remainder of the period until 2027. Beyond looking at the financial targets set in the NDICI-Global Europe, the MTR should also include an assessment of how the EU has enacted them, to be able to readjust the way they are tackled if need be. The MTR should notably take into account the performance of partner countries as well as potential new needs or priorities, and should also allow for an assessment of commitment to and progress on human rights, democracy and gender equality.

The advancement of these principles in the programming and implementation of the NDICI-Global Europe is primarily done through gender mainstreaming and the HRBA, without necessarily making them a principal or exclusive objective of EU interventions. Mainstreaming is essential to ensure that the analysis, design and monitoring of policies and interventions really integrate gender equality and human rights. Yet, there are methodological challenges in mainstreaming human rights and gender equality in a consistent manner, as well as measuring the results and impact of this approach. Furthermore, mainstreaming alone isn't enough and there is a need to go beyond that by ensuring dedicated funding and focused interventions. Additionally, gender mainstreaming and the HRBA that underpins the implementation of the external action of the EU should be combined. The sharing of good practices as well as a discussion on whether mainstreaming is sufficient or how it can usefully complement more targeted actions can also contribute to raising the impact of the interventions of the EU and its member states.

Conditionality and incentive-based approaches are increasingly being used in recent years by the EU as a way to reaffirm Europe's standing on human rights and democratic principles globally. However, these mechanisms have not always proven as effective as intended and have been applied inconsistently. Democratic reforms cannot be bought and the promotion of democracy, human rights and gender equality goes beyond the actions funded under the NDICI-Global Europe.

The EU has to strengthen links between its financial instruments and its various policy and political processes and tools. The EU's approach is strategically framed by the EU action plan on human rights and democracy and the Gender action plan III respectively. Cross-linkages and synergies between these tools and processes must be ensured, both in terms of approaches and reporting mechanisms. In addition, both the action plan for human rights and democracy and the GAP III will be subject to an MTR in Spring 2023, and opportunities for stronger synergies should thus be sought in that framework. These reviews will be important to assess the impact of the EU's external action in that field and should lay the ground for further adjustments in the framework of the MTR of the NDICI-Global Europe, which will take place in 2024.

The 'policy first' principle that guides the NDICI-Global Europe also implies a need for stronger synergies between various policy processes in order to move towards a more strategic and coherent approach of EU external action. Policy dialogue remains in that context an essential way to promote democratic principles and good governance in EU development cooperation. Yet, it appears that these dialogues are not equally conducted and as advanced in all parts of the world. EU delegations play a central role in leading these key policy dialogues with the partner countries, and even have an obligation to do so on gender issues. The whole delegation should engage on these topics and have an enhanced mandate to do so, which should also come with adequate resources and expertise.

The EU and member states speaking with one voice in the policy and political dialogues with partner countries is also key to ensuring visibility, coherence and impact. Promoting democracy, human rights and gender equality is a joint responsibility of the EU and its member states, and a TE approach should be promoted and strengthened to this end. While the TEIs do encourage joint policy dialogues with partner countries and regions in the broad areas covered by the TEIs, they do not however provide any framework to do so. More structured dialogues at all levels

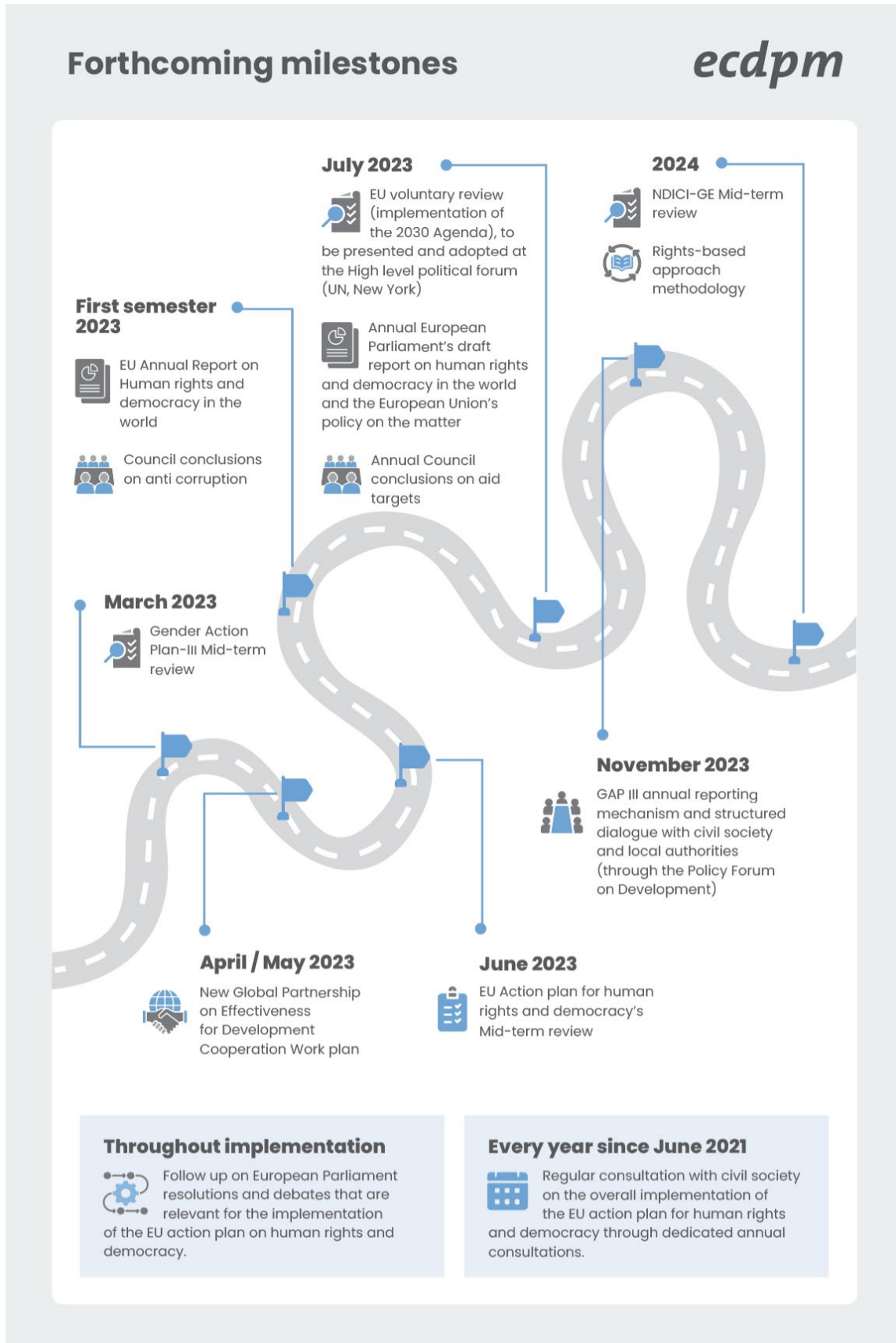
and involving all TE members should thus be further encouraged, including by making the linkages to other longer-term processes such as joint programming.

TEIs represent the lion's share of the NDICI-Global Europe funding in most countries and will thus account for a large part of the achievement of EU targets on human rights, democracy and gender. Yet, there is no clear mechanism in place to ensure or assess the broader impact of TEIs on the promotion of democracy, human rights and gender equality. Moving forward, a major challenge will be to ensure a common approach between the EU and the other TE members in setting common horizontal objectives and monitoring criteria for all TEIs. In that regard, a balance should be found between the light and flexible governance and reporting structure of the TEIs, and the need for a more comprehensive monitoring and reporting that allows assessing how individual TEIs will contribute to advancing gender equality, democracy and human rights, capturing not only the EU contributions but also those of the other participating TE members.

The need for more collaboration among European stakeholders should not be done at the cost of local ownership and the involvement of other stakeholders in partner countries. The promotion of universal values and rights has to be fully owned in order to be effectively and meaningfully implemented afterwards. Beyond the national authorities, whose ownership and commitment are essential, CSOs, LAs and the private sector are also key partners when it comes to promoting democracy, human rights and gender equality and ensuring that these principles are addressed and implemented in a meaningful, long-term sustainable manner. Including CSOs and LAs in the policy dialogue is a first step towards a more regular and meaningful engagement with them. Consultation mechanisms exist at HQ level, including through the PFD, the consultations at partner country level differ greatly from country to country and suffer from a certain lack of guidance. In this regard, the CSO and LA roadmaps should provide the framework for meaningful and timely consultations at country level and ensure local ownership, but they should be further developed. Here again, the role of EU delegations is crucial as well as that of member states present in partner countries, adequate resources and expertise should be ensured. Furthermore, when it comes to supporting CSOs and LAs as governance actors, modalities should be better adapted to the realities on the ground, to make sure that local decision-making bodies/institutions as well as grassroots organisations can also benefit from the EU-funded programmes.

Given the increasing role of the private sector and the use of EU aid to leverage investments, notably through the EFSD+ and external action guarantee, a reflection on a more structured dialogue with the private sector is needed to ensure that these investments and projects financed with EU resources respect EU principles and commitments, notably on democracy, human rights and gender equality, or at least do-no-harm. The business advisory group set up in the framework of the GG should also be used to this end. In addition, other EU initiatives on corporate sustainability and due diligence can also have an impact on EU companies' practices and trade relations. This could also usefully be added to the agenda of the political and policy dialogues with partner countries.

Figure 3: Forthcoming milestones



Source: ECDPM

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In addition to structural support by ECDPM's institutional partners: Austria, Belgium, Denmark, Estonia, Finland, Ireland, Luxembourg, The Netherlands and Sweden, this publication also benefits from a contribution by the Swedish presidency of the Council of the EU.



ISSN1571-7577