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Structural and Cohesion Policies

**GENDER MAINSTREAMING
IN THE USE OF STRUCTURAL FUNDING**

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Gender Mainstreaming in the Use of Structural Funding

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Directorate General for Internal Policies of the Union

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Content:

Gender mainstreaming is a transversal dimension of the policy programming and implementation of all Structural Funds. The study outlines to what extent the gender mainstreaming has been taken into account in the 2000-2006 Structural Funds programming. Policy fields (and phases) where progress has been made and policy fields (and phases) where progress is still slow are highlighted. Major findings show that better results are achieved upstream the policy process, rather than downstream at implementation level. Overall, much has been done to gather the necessary conditions for successful gender mainstreaming over the 2007-2013 period. However, more could be done to translate broad and specific objectives into practice and effective actions.

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Executive summary

Gender mainstreaming is a policy approach which aims at integrating a gender perspective into every policy and into every step of policy processes, from design to implementation, monitoring and evaluation. It is based on the recognition that women and men do not have the same resources, needs and preferences and that many structures, systems and policies are not gender neutral, but treating men's experience as the norm.

Equal opportunities between men and women and the gender mainstreaming principle are expressly indicated in the Regulations of the Structural Funds as transversal dimensions of the policy programming and implementation.

Promoting gender mainstreaming is not only a formal requirement. It is important because of the strong positive correlation that emerges between economic growth and gender equality. The direction of causality goes mainly from economic growth to gender equality since a higher economic level is usually followed by increased education, democracy and greater gender equality. But there is also a positive link going from greater gender equality to economic growth: increased women's participation in the labour market increases gross domestic product as more human resources are involved in the production system. The inclusion of women in the labour market and in policy-making also contributes to an increase in the quality of life and in future growth due to their effects on child rearing.

There are therefore both equity and efficiency arguments to support gender mainstreaming. Discrimination and segregation entail inefficiency. The benefits for the (local) economy of eradicating discrimination come from the better utilisation of resources which may enhance the competitiveness of the (local) economy. When the economic role of individuals is defined by gender rather than merit or ability, there is inefficiency with under-utilisation of the skills of one group (women). Policies to reduce gender segregation in society and the economy may also help to develop a multi-skilled workforce and improve work organisation patterns. An increased and egalitarian participation of women in the economy may also improve the family conditions if the shared interest of women and children are supported by policies promoting balance between work and life.

This study tries to outline to what extent the gender mainstreaming dimension has been taken into account in the Structural Funds 2000-2006 programming period, with specific attention to Regional Development and Cohesion Funds, in order to highlight policy fields where progress has been made and discover policy fields where progress is slow. In this perspective useful lessons to strengthen the gender dimension in the new policy programming for 2007-2013 are derived.

The analysis is carried out through the review, from a gender perspective, of 122 Operational Programmes (OPs) for Objective 1 and Objective 2 regions in nine Member States (Austria, Belgium, France, Germany, Ireland, Italy, the Netherlands, Spain and the United Kingdom) and available secondary material, such as national and EU-wide evaluations, monitoring and planning documents, which allowed for an extension of the analysis to other European countries.

Major findings of the study show that better results are achieved upstream in the policy process (context analysis, definition of the overall strategy), rather than downstream at implementing stages (involving relevant expertise, representative organisations, monitoring, evaluation etc). Overall, the impression is that much has been done to set the necessary conditions for successful gender mainstreaming over the 2000-2006 period, in particular acknowledging the legitimacy of the gender mainstreaming strategy. However, the benefits seem not to have been reaped yet. More could be done to translate broad and specific objectives into practical and effective actions.

Major findings also show that within the European Union (EU), in the Structural Funds planning, Member States have different degrees of gender sensitivity and (gender) policy action is defined through differentiated approaches. Scandinavian and Anglo-Saxon countries are usually more advanced in the mainstreaming of a gender dimension in policy-making, while Continental and Southern European countries are still mainly relying on specific *gender measures*, even if declaring the adoption of a dual approach. Some innovative approaches, tools and methodologies have been developed all along the policy cycle, but their use and dissemination have been limited by the lower awareness of the importance of gender equality for socio-economic growth among (local) policy makers and administrations

Specific findings, referring to the different phases of the Structural Funds programming 2000-2006, indicate the following situation.

- **Gender mainstreaming in the context diagnosis of the Structural Funds programming.** Regional Operational Programmes (ROP) widely take into account the gender dimension in the context analysis, through the adequate use of gender specific issues and indicators, with a special focus on the structure and dynamics of the labour market. Less well-grounded is the policy makers' capacity to include gender-relevant dimensions into those issues that are not 'immediately' related to women such as transport infrastructure and services not related to childcare or elderly care provisions, where European Regional Development Fund (ERDF) and Cohesion Fund are significantly involved.
- **Gender mainstreaming in strategy definition and design.** The formal commitment to gender mainstreaming is present in all the OPs, but only in some cases a specific Mainstreaming Strategy can be envisaged. Gender mainstreaming often emerges in equal opportunities general objectives, again finding in the labour market (and partially in community building) the most favourable ground to tackle the gender discrimination and disadvantages.
- **Gender mainstreaming in specific objectives and design of measures.** The design of the specific interventions in the programming shows even more clearly the two different approaches within the EU countries to the 'gender question'. On the one hand there is the approach to gender mainstreaming principle (Anglo-Saxon and Northern Countries), and on the other the dual approach combining gender mainstreaming with positive/affirmative actions (Continental and Southern Countries).

Regarding gender mainstreamed fields of intervention, Enterprise and Innovation, Strategic Development Opportunities, Sustainable Communities, Development of rural area seem to be the ones where Structural Funds Programmes drew the major policy makers' attention. Regarding affirmative actions, fields of intervention are exclusively focused on training and labour market policies.

- **Gender mainstreaming and resources allocation.** The assessment of resource allocation in the Structural Funds is a difficult aspect to deal with in a mainstreaming perspective since it is difficult to have an allocated budget for mainstreaming (while affirmative actions are more likely to have). The development of specific tools, such as gender budgeting, to be used also in the Structural Funds programming could be widespread and supported as a common framework to assess the amount of financial resources allocated to gender mainstreaming within the programmes.
- **Gender mainstreaming and (envisaged) procedures for the selection of projects.** Gender selection criteria mentioned in the OPs show that, at an operational level, Structural Funds are less gender-oriented. Indeed, all the OPs envisage gender criteria for the selection of the projects (i.e. gateway criteria, additional scores, coherence with cross cutting themes, explicit female target etc.) but their operational content is often weak and approximate: more specific and tailor-made criteria should be designed.
- **Gender mainstreaming and monitoring and evaluation of the programme.** In an overall assessment, on the one hand the OPs show a good effort in designing gender indicators connected with the monitoring and the evaluation of specific measures, even though the effort is often limited to the consideration of data broken down by gender. On the other hand, comprehensive Programme Evaluation from a gender mainstreaming perspective (along with connected methodologies and tools) do not seem to be adequately considered. In this respect the availability of gender-disaggregated data and gender-sensitive monitoring systems is a central question.
- **Gender mainstreaming and managing organisations.** At a general level, managing organisations have started to take into account the necessity of involving bodies that, at different levels, are responsible for equal opportunities, as well as gender experts. This involvement is still at a formal level and often limited to consultative roles.

The above mentioned advancements show that there have been meaningful improvements in the 2000-2006 programming period but also show that the inclusion of mainstreaming policies in Structural Funds should be perfected and strengthened in the perspective of the 2007-2013 period.

The main risk is that all the elements and issues in some way connected to gender mainstreaming will be considered as a mere formality to be complied with and not as an important tool to enhance and improve Europe and its citizens (both men and women).

Another concern (also confirmed by the few references to gender equality in ERDF Regulations) is that a gender perspective will be used only with reference to actions towards people and human capital (like those financed by the European Social Fund) and not in all the actions that Structural Funds are intended to support. The latter could really diminish the force of the gender mainstreaming concept through all the policies and in all their policy phases, contributing to isolating and therefore not enabling gender mainstreaming to produce a significant impact in terms of gender equality.

The objective must be to design a development process able to eliminate gender neutrality when defining the interventions, providing a strategy addressed to the system and not only to individuals. Probably, as well as the horizontal integration of equal opportunities, there is still the need for specific measures to support women to overcome particular conditions of inequality and to properly integrate interventions directed at people with those directed at infrastructures, in order to achieve strong and effective results.

A specific political stance is required for this to happen, together with a greater awareness of the importance of gender equality for socio-economic growth within the political and administrative culture and an improved capacity to concretely address these issues and involve the local actors. A greater attention to the connection between gender mainstreaming and socio-economic growth could be the starting point to overcome the design of strategies where women are only the 'passive' beneficiaries of the intervention.

To achieve the goal, there are two main focuses.

On the one hand it is necessary to deal with some difficulties that have characterized gender mainstreaming in the 2000-2006 programming such as a still grounded confusion on the actual meaning of gender mainstreaming, too often interpreted as the mere promotion of positive actions, the lack of adequate instruments and dedicated resources (human and financial) for the effective implementation of gender mainstreaming and the operational difficulty of putting into practice gender mainstreaming in development policies that are not directly addressed to individuals.

On the other hand, lessons learned from the 2000-2006 programming period and suggestions for further supporting gender mainstreaming indicate the following dimensions as priorities:

- Building equal opportunities governance. If equal opportunity objectives are to become an integral part of growth and development policies, effective 'equality governance' is a prerequisite.
- Improve management and implementation skills. Appropriate procedures for internalising the gender mainstreaming perspective in the selection criteria; implementation methods and indicator systems; technical assistance teams to support gender mainstreaming in carrying out project interventions; equal opportunities expertise in programme/project management should be reinforced as they account for the quality of results and outcomes of the overall programmes.
- Improving monitoring and evaluation tools. The definition and dissemination of guidelines, criteria, methods and techniques, at European and national/local level, in order to further develop the tools and indicators that have been implemented in 2000-2006 is a crucial priority.
- Supporting institutional learning through cooperation and exchange of good practices as a key tool to successfully promote institutional learning across and within Member States with explicit reference to gendered programming and implementation of projects.
- Improving communication strategies to increase the awareness among all key players and to emphasise gender issues and programme achievements, including the socio-economic role of women.

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Acronyms

CCT	Cross-cutting theme
CSF	Community Support Framework
DEO	Italian Department of Equal Opportunities
EAGGF	European Agricultural Guidance and Guarantee Fund
EO	Equal Opportunities
ERDF	European Regional Development Fund
ESF	European Social Fund
FIFG	Financial Instrument for Fisheries Guidance
GIA	Gender Impact Assessment
ICT	Information and Communication Technology
NGO	Non Governmental Organisations
OP	Operational Programme
PMC	Programme Monitoring Committee
ROP	Regional Operational Programme
QLFD	Quarterly Labour Force Data
R&D	Research and Development
SFSG	Structural Funds Strategy Group
SME	Small and Medium Enterprise
SPD	Single Programming Document
SWOT	Strengths, Weaknesses, Opportunities, Threats
VISPO	Valutazione dell'Impatto Strategico sulle Pari Opportunità (Strategic Gender Impact Assessment of Equal Opportunities)
WEFO	Welsh European Funding Office

Glossary

Discrimination – Direct:	when one person is treated less favourably than another in the same circumstances, on the ground of their sex, race, sexual orientation, religion or belief, disability, or age.
Discrimination – Indirect:	where a law, regulation, policy or practice which is apparently neutral, would put persons of a given group at a particular disadvantage compared with other persons, unless the provision, criterion or practice can be objectively justified by a legitimate aim and the means of achieving that aim are appropriate and necessary.
Diversity:	the range of values, attitudes, cultural perspectives, beliefs, ethnic background, sexual orientation, skills, knowledge and life experiences of the individuals making up any given group of people.
Equal opportunities for women and men:	the absence of barriers to economic, political and social participation on the grounds of sex.
Gender:	refers to the social differences, as opposed to the biological ones, between women and men that have been learned, are changeable over time and have wide variations within and between cultures.
Gender analysis:	the study of differences in the conditions, needs, participation rates, access to resources and development, control of assets, decision-making powers, etc. between women and men in their assigned gender roles.
Gender audit:	the analysis and evaluation of policies, programmes and institutions in terms of how they apply gender-related criteria.
Gender awareness:	the ability to identify problems arising from gender inequality and discrimination, even if these are not very evident on the surface, or are "hidden" - i.e. are not part of the general or commonly accepted explanation of what and where the problem lies. In other words, gender awareness means a high level of gender conscientisation.
Gender blind:	ignoring/failing to address the gender dimension (as opposed to gender sensitive or gender neutral).
Gender disaggregated data:	the collection and separation of data and statistical information by gender to enable comparative analysis/gender analysis.
Gender equality:	the concept that all human beings are free to develop their personal ability and make choices without the limitations set by strict gender roles; that the different behaviours, aspirations and needs of women and men are considered, valued and favoured equally.
Gender equity:	fairness of treatment by gender, which may be equal treatment or treatment which is different but which is considered equivalent in terms of rights, obligations and opportunities.
Gender Impact Assessment:	examining policy proposals to see whether they will affect women and men differently, with a view to adapting these proposals to make sure that discriminatory effects are neutralised and that gender equality is promoted.

Gender mainstreaming:	addressing gender issues in all development projects and programmes, irrespective of sector, type or project. Mainstreaming is therefore the very opposite of a strategy of segregating gender issues into separate "women's projects".
Gender needs:	leading on from the fact that women and men have differing roles based on their gender, they will also have differing gender needs. These needs can be classified as either strategic or practical needs.
Gender neutral:	having no differential positive or negative impact for gender relations or equality between women and men.
Gender planning:	taking account of gender issues in planning. In development planning, it means that gender issues are recognised in the identification of the problem and addressed in development objectives.
Gender proofing:	a check carried out on a policy proposal to ensure that any potential gender discriminatory effects arising from that policy have been avoided and that gender equality is promoted.
Gender relations:	these are the social relationships between women and men. Gender relations are simultaneously relations of co-operation, connection, and mutual support, and of conflict, separation and competition, of difference and inequality. Gender relations are concerned with how power is distributed between the sexes. They create and reproduce systemic differences in men's and women's position in a given society. They define the ways in which responsibilities and claims are allocated and the way in which each is given a value.
Gender sensitivity:	the ability to recognize gender issues, and especially the ability to recognize women's different perceptions and interests arising from their different social location and different gender roles. Gender sensitivity is often used to mean the same as gender awareness, although gender awareness can also mean the extra ability to recognize gender issues which remain "hidden" from those with a more conventional point of view. But here we define gender sensitivity as the beginning of gender awareness, where the latter is more analytical, more critical and more "questioning" of gender disparities.
Positive action:	a generic term for programmes which take some kind of initiative either voluntarily or under compulsion of the law, to increase, maintain or rearrange the number or status of certain group members usually defined by race or gender, within a larger group. Positive action is permitted under the sex and race legislation in order to help overcome obstacles to full equality of opportunity. Targeted at a particular group and intended to eliminate and prevent discrimination or to offset disadvantages arising from existing attitudes, behaviours and structures.
Sex:	identifies biological differences between men and women.

Source: adaptation from United Nations International Research and Training Institute for the Advancement of Women (www.un-instraw.org) and Mediterranean Institute for gender studies (www.medinstgenderstudies.org)

1. Study framework

1.1. Scope of the study

The European Structural Funds have contributed to increasing the attention of policy makers and of public administrations to the gender dimension, as well as to the financing of national and local initiatives devoted to the promotion of equal opportunities between men and women. At the closing of the programming period 2000-2006, the assessment and evaluation of how much the gender dimension has been considered in the Structural Funds programming and implementation is relevant both to understand its effects on gender equality, and to derive some useful indications for the programming period 2007-2013.

The purpose of the present study is to outline to what extent the gender mainstreaming dimension has been taken into account in the Structural Funds 2000-2006 programming period, with specific attention to Regional Development and Cohesion Funds, by considering all the phases of the policy cycle, in order to highlight policy fields where progress has been made and policy fields where progress remains slow. The adopted perspective is deriving useful lessons to strengthen the gender dimension in the policy programming for 2007-2013.

1.2. Gender mainstreaming and Structural Funds

Gender equality has been a priority objective of the four European Structural Funds since 1994⁽¹⁾ and has been reinforced in the programming period 2000-2006, through a dual approach strategy that combines gender mainstreaming with dedicated measures to promote gender parity.

In tackling gender equality, the European Union (EU) has adopted a *dual approach strategy*, which encompasses both pro-active interventions (gender mainstreaming or indirect policies) and reactive interventions (dedicated measures *or direct policies* such as policies tackling gender gap, reconciling policies, etc). This integrated approach marks an important change from the previous Community action on equal opportunities for women and men, mainly based on compartmental activities and programmes funded under different specific budget headings⁽²⁾.

Gender equality (or equal opportunities) as defined by the Council of Europe (1998), *'means an equal visibility, empowerment and participation of both sexes in all spheres of public and private life. Gender equality is the opposite of gender inequality, not of gender difference, and aims to promote the full participation of women and men in society.'*

Gender mainstreaming *'is the (re)organisation, improvement, development and evaluation of policy processes, so that a gender equality perspective is incorporated in all policies at all*

⁽¹⁾ European Social Fund, European Regional Development Fund, European Agricultural Guidance and Guarantee Fund, Financial Instrument for Fisheries Guidance

⁽²⁾ The Framework Strategy on Gender Equality aims at coordinating all the different initiatives and programmes under a single umbrella built around clear assessment criteria, monitoring tools, the setting of benchmarks, gender proofing and evaluation. (COM(2000) 335 final). The commitment of the EU in promoting gender equality and gender mainstreaming throughout the European Community was then reinforced and formalised by the introduction in the Principles of the EC Treaty (1957) of specific references to gender equality (Art. 2) and gender mainstreaming (Art. 3, 'In all the activities referred to in this Article, the Community shall aim to eliminate inequalities, and to promote equality, between men and women').

levels and at all stages, by the actors normally involved in policy-making. [(Council of Europe, 1998)]⁽³⁾.

Gender mainstreaming is thus a policy approach which aims at integrating a gender perspective into every policy and into every step of policy processes, from design to implementation, monitoring and evaluation⁽⁴⁾. It is based on the recognition that women and men do not have the same resources, needs and preferences and that many structures, systems and policies are not gender neutral, but treating men's experience as the norm.

Gender mainstreaming requires the mobilisation of actors and resources, which have important implications for policy making:

- 1) On the one hand, it suggests that equal opportunities for men and women are no longer attainable through gender-specific policies alone, but require a holistic approach, which incorporates equality goals into all traditional policy areas. This means horizontal integration, across all policy areas, and vertical integration through all levels of the policy hierarchy.
- 2) On the other hand, this approach assumes that in order to achieve equality it is necessary to transform and innovate the policy-making process and the institutional or power relationships, with the adoption of an equality approach at all stages of the policy process:
 - a) policy decision making and design should provide for the involvement of women representatives (Parity Organisms) in (local) partnerships, the development of gender-disaggregated data gathering and indicators, the implementation of gender impact assessment procedures;
 - b) policy implementation should provide for the creation of parity coordination offices within and between administrative departments, the design of monitoring systems and indicators, the training and capacity building among public administrations, the availability of sufficient resources, the involvement of parity organisms in all the programming stages from tendering to project generation, project selection, implementation;
 - c) project selection and policy monitoring and evaluation should develop gender-related evaluation methodologies and skills.
- 3) The adoption of a mainstreaming approach thus implies capacity building among all policy stakeholders and requires identifying needs, adapting programme management tools and instruments and mobilising political support and resources.

⁽³⁾ The concept of gender mainstreaming appeared for the first time in the United Nations Third World Conference on Women (Nairobi, 1985), in relation to the debate on the Status of Women and on the role of women in development, and was adopted in the Platform for Action defined at the United Nations Fourth World Conference on Women (Beijing, 1995).

⁽⁴⁾ In 1996, the Commission defined the adopted Gender Mainstreaming approach as: 'The systematic consideration of the differences between the conditions, situations and needs of women and men in all Community policies and actions: this is the basic feature of the principle of 'mainstreaming', which the Commission has adopted. This does not mean simply making Community programmes or resources more accessible to women, but rather the simultaneous mobilisation of legal instruments, financial resources and the Community's analytical and organisational capacities in order to introduce in all areas the desire to build balanced relationships between women and men. In this respect it is necessary and important to base the policy of equality between women and men on a sound statistical analysis of the situation of women and men in the various areas of life and the changes taking place in societies.' COM (96) 67 final.

The Structural Funds general regulation⁽⁵⁾ (2000-2006) adopted the gender mainstreaming approach by stating that the gender equality dimension must be incorporated into all operations co-financed by the Funds. The equal opportunity principle must be considered in every step of the policy cycle:

- the ex-ante evaluation of the national plans must take equal opportunities into account (Article 41);
- statistics and monitoring indicators are to be broken down by sex (Article 36); the contribution of the Funds must be differentiated according to whether measures promote equality (Article 29);
- the monitoring committees have to guarantee a balanced participation of men and women (Article 35) and the Managing Authorities shall be responsible for ensuring that publicity is given and for informing bodies which promote equality for men and women (Article 46).

In addition to the gender mainstreaming principle, specific measures to promote gender parity are also envisaged. The European Social Fund (ESF)⁽⁶⁾ should provide for measures to increase the involvement of women in the labour market, including their career development and their access to new job opportunities, to reduce gender-based vertical and horizontal segregation in the labour market (Article 2e of the ESF Regulation). The regulations of European Regional Development Fund (ERDF), the European Agricultural Guidance and Guarantee Fund (EAGGF), and the Financial Instrument for Fisheries Guidance (FIFG)⁽⁷⁾, even if not encouraging specific policy fields devoted to equal opportunities, underline gender parity as a horizontal priority and a specific commitment for the Programming period 2000-2006.

1.3. Contents and outline of the study

The present study uses a policy cycle approach (Chart 1) with a gender perspective, in order to assess to what extent a gender mainstreaming approach has been internalised not only in the ESF (where the adoption of a gender approach is relatively straightforward), but also in the ERDF and in the Cohesion Fund.

The analysis is based on the review of 122 Operational Programmes (OPs) for Objective 1 and Objective 2 regions in nine Member States (Austria, Belgium, France, Germany, Ireland, Italy, The Netherlands, Spain and the United Kingdom) and available secondary data, such as national and EU-wide evaluations, monitoring and planning documents, which allowed for an extension of the analysis to other European countries (especially the Scandinavian countries). In this regard it is acknowledged the support of the European Commission⁽⁸⁾, national authorities and experts, and especially the High Level Group on gender mainstreaming and thematic networks.

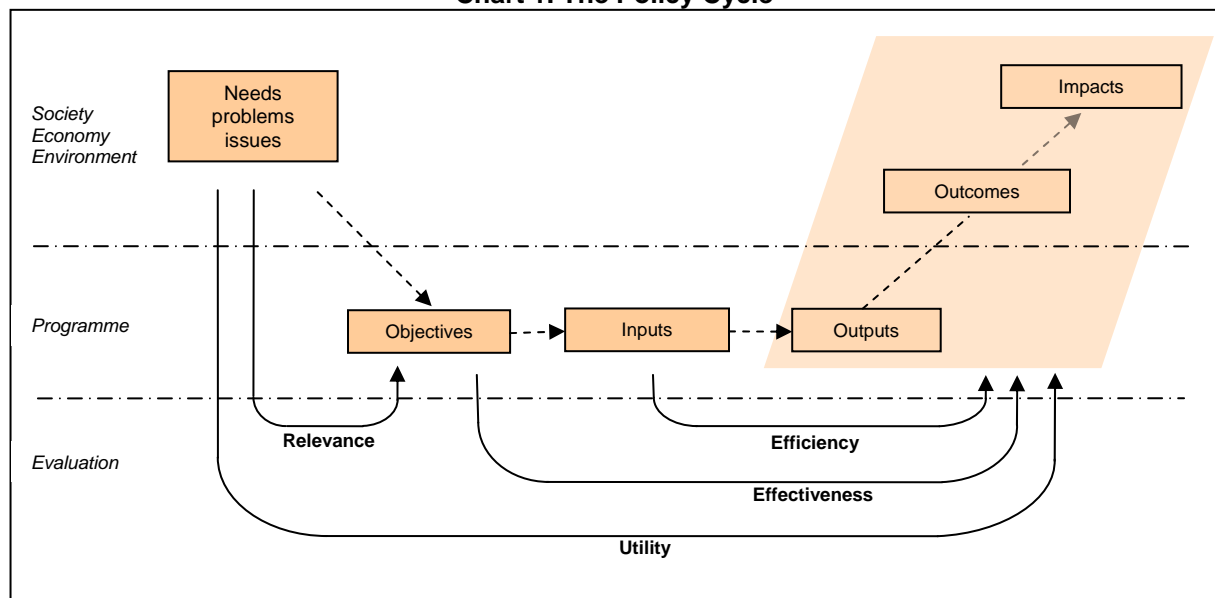
⁽⁵⁾ Council Regulation (EC) No 1260/1999 (of 21 June) 1999 laying down general provisions on the Structural Funds.

⁽⁶⁾ Regulation (EC) No 1784/1999 of the European Parliament and of the Council of 12 July 1999 on the European Social Fund

⁽⁷⁾ Regulation (EC) No 1783/1999 of the European Parliament and of the Council of 12 July 1999 on the European Regional Development Fund, Council Regulation (EC) No 1257/1999 of 17 May 1999 on support for rural development from the European Agricultural Guidance and Guarantee Fund (EAGGF), Council Regulation (EC) No 1263/1999 of 21 June 1999 on the Financial Instrument for Fisheries Guidance

⁽⁸⁾ In particular: ESF Coordination Unit (DG Employment), Unit 'Thematic Development and Impact' (DG Regio), Evaluation Unit (DG Regio).

Chart 1. The Policy Cycle



Source: *The evaluation of socio-economic development – The Guide*, Tavistock Institute, GHK, IRS, 2004

The report is structured as follows:

- Chapter 2 presents a brief overview of the current gender gaps in the labour market conditions across all the Member States to set out the background of the study.
- Chapter 3 presents how and to what extent gender equality has been mainstreamed into the OPs for the period 2000-2006 and what lessons may be learned for the future. The analysis is organised by policy phase and the main dimensions considered are:
 - the attention paid to gender equality and gender-related issues in **the needs assessment** of OPs;
 - the attention paid to the definition of **general and specific gender equality and gender-related objectives** in the general design of the intervention strategy and in the specific design of measures;
 - the attention paid to gender mainstreaming and, more specifically, to measures presenting the most relevant gender contents in the **resources allocation**;
 - the consideration of gender-related issues in the **tendering and selection mechanisms** in the OPs;
 - the involvement of gender bodies/institutions in the **decisional process** and in the design of the **managing organisation and bodies** responsible for implementing the OPs;
 - the design of **monitoring and evaluation systems** with gender-relevant and gender-sensitive indicators.
- Chapter 4 presents an overview of gender-specific issues in the new Structural Funds regulations 2007-2013 in order to show the main changes as compared to the previous programming period and the potential impact on gender equality.
- Chapter 5 sets out technical and policy-relevant recommendations with specific reference to those policy areas where gender mainstreaming appears to be weaker or progressing slowly.

2. Background of the study

Looking at the performance of countries and regions in the 20th century **a clear positive correlation emerges between economic growth and gender equality in the labour market**. The direction of causality goes mainly from economic growth to gender equality. But there is also a positive link going from greater gender equality to economic growth: increased women participation in the economy increases gross domestic product. This is because more, usually highly educated, human resources are involved in the productive system. The inclusion of women in the labour market and in policy making also contributes to raising the standards of life and future growth for its effects on child rearing⁽⁹⁾.

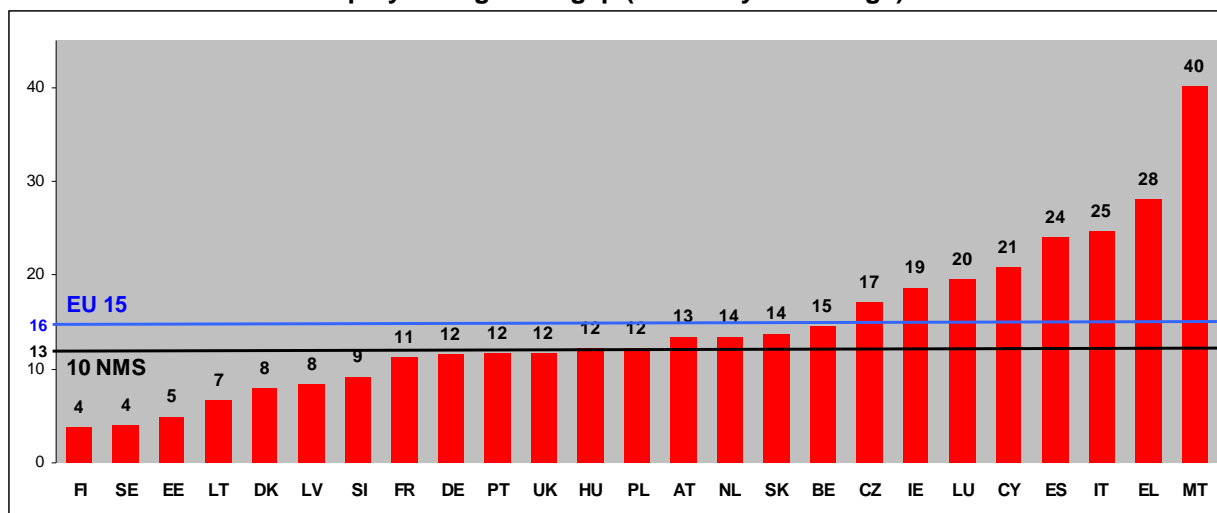
There are therefore both equity and efficiency arguments to support women's presence in the economy and in policy making. Discrimination and segregation entail inefficiency. The benefits for the economy of eradicating discrimination come from the better utilisation of resources which may enhance the competitiveness of the economy. When the economic role of individuals is defined by gender rather than merit or ability, there is inefficiency with under-utilisation of the skills of one group (women). Policies to reduce gender segregation in society and the economy help develop a multi-skilled workforce and improve work organisation patterns. An increased and equalitarian participation of women in the economy may also improve the family conditions, if the joint interest of women and children are supported by policies promoting the work-family life balance.

For these reasons, **supporting equal opportunities should not be limited to employment policies**, but it should consider wage determination and work organisation practices (involving the social partners), policies influencing family care tasks (such as welfare, taxation, the provision of care and community services), social and cultural environments (such as communication and educational policies) and development patterns (industrial and infrastructural policies). Indeed, the increase in female participation rates registered in EU countries over the last decades has been largely explained by factors not directly related to equal opportunity policies in the labour market, such as the expansion of the service sector, the increase in women's education levels, the decline in fertility rates, the increase in single parents and the changes in consumption habits.

The relevance of women's inclusion in the labour market for economic growth has been considered at European level by the **recognition that the Lisbon target of 70% employment rate is only attainable if women's employment rates increase to at least 60% by 2010**. New benchmarks for childcare provisions have also been defined, as well as the need to improve equality in access to the knowledge-based economy.

⁽⁹⁾ It is for this reason that the most recent developments in aid programmes for developing countries regard women as an important actor in local development, and as a result many development support programmes have women, rather than men, as beneficiaries for loans and investments (as, for example, the Yunus experiment in Bangladesh).

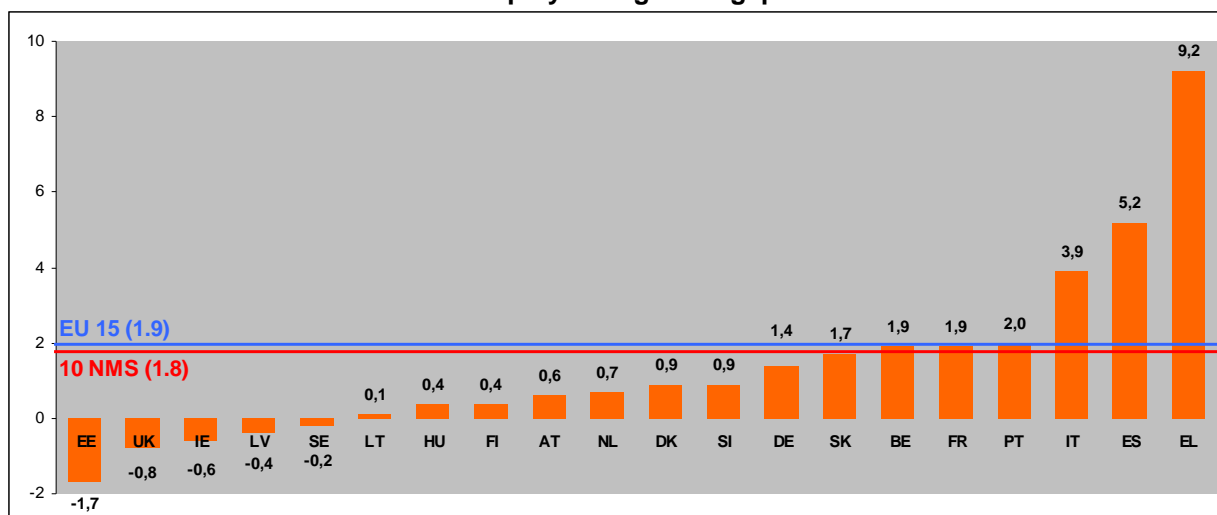
Chart 2. Employment gender gap (15 to 64 years of age) in 2005*



* The difference in employment rates between men and women in percentage points
 Source: *Quarterly Labour Force Data (QLFD) - Annual averages*

Five years on from the Lisbon meeting, the Council of Europe in Brussels (22-23 March 2005) underlined that the **equal opportunities objectives were only partially reached** and that it was necessary to re-launch the Lisbon Strategy by focusing attention on the promotion of growth and employment consistently with the goal of sustainable development. The new social Agenda for the period 2006-2010 underlines the crucial role of both women and men in developing the social dimension of economic growth.

Chart 3. Unemployment gender gap in 2005*



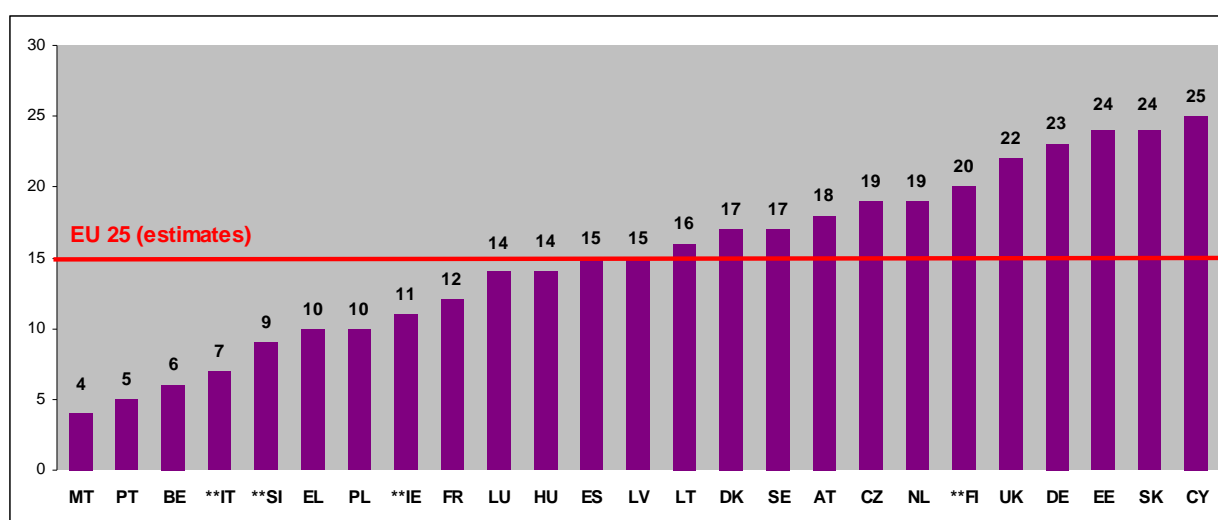
* The difference in unemployment rates between women and men in percentage points. Harmonised unemployment series (+25 years)
 Source: *Quarterly Labour Force Data (QLFD) - Annual averages*

Indeed over the recent decades the role of women in Member States economies and labour markets has risen significantly. Women's employment is increasing at higher rates than males' and the majority of the European Member States now complies with the 60% female employment rate target. Moreover, average earnings of women have risen (although the rise has been small) in relation to those of men in most Member States. Significant improvements are also visible in education: among new generations women present higher rates in

educational attainment than men in almost all European countries: in 2005, the percentage of the female population aged 20-24 having completed at least upper secondary education was 5 percentage points higher than that of males (EU-25). Furthermore, female participation to life-long learning is higher than males', especially for the employed population.

Nevertheless, in almost all Member States the unemployment rate for women is still systematically higher than for men (by 2 percentage points on average for the EU-25, and especially for Southern and Eastern European Countries) and women's employment rate remains lower than men's by 15 percentage points (EU-25). The gender pay gap remains high, even when accounting for compositional effects, and women generally have less regular and secure jobs (part-time work bears on 33% of women, as against only 7% of men⁽¹⁰⁾ and in almost all MS temporary contracts are more widespread among women⁽¹¹⁾). Gender segregation across sectors⁽¹²⁾ and occupations⁽¹³⁾ is high even in Nordic European countries, which are normally characterised by high female employment rates and high participation of women in the political decision-making process.

Chart 4. Gender pay gap (public and private sector) in 2004*



* Difference between men's and women's average gross hourly earnings as percentage of men's average gross hourly earnings (for paid employees)

** SI (2002); FI (2003); IE and IT provisional data

Source: EUROPEAN COMMISSION, *Indicators for monitoring the Employment Guidelines including indicators for additional employment analysis 2006 compendium*

⁽¹⁰⁾ European Commission (2006), *Report on equality between women and men*, Luxembourg.

⁽¹¹⁾ Eurostat (2002), 'At the margins of the labour market? Women and men in temporary jobs in Europe', *Statistics in Focus*, 13/2002.

⁽¹²⁾ Women are mostly employed in the service and in the public sector, while less represented in growing sectors, such as high-technology.

⁽¹³⁾ In 2004, women represented 32% of managers in Europe. However, women's share of top management positions in firms (i.e. membership of the daily executive bodies of top companies) was only 10%. (European Commission, 2006).

3. The 2000-2006 experience in a gender equality perspective: what lessons for the future?

The analysis, based on a review of Structural Funds regional programmes in Member States, aims at illustrating, as far as possible, how a gender mainstreaming approach is internalised in Objective 1 and Objective 2 OPs. **This analysis is based on a broad review of a sample of OPs.**

This overview is useful in **identifying patterns of strength and weakness across countries and regions**. A series of interesting results is obtained, which enables to identify cases where outcomes seem to be positive, and situations apparently more adverse to gender mainstreaming.

It should be stressed that the value (and the limit) of this analysis lies in the comparisons it makes possible. In short, it allows for an assessment of the relative position of regional programmes in countries with respect to gender mainstreaming.

Overall, **the impression is that much has been done to set the necessary conditions for successful gender mainstreaming over the 2000-2006 period**, in particular acknowledging the legitimacy of gender mainstreaming strategy. **However, the benefits seem not to have been reaped yet.**

Overall Findings

- in general, better results are achieved upstream of the policy process (context analysis, definition of the overall strategy), rather than downstream at implementing stages (involving relevant expertise, and representative organisations, monitoring and evaluation etc);
- resource allocations is clearly an area of underperformance, but monitoring is also often a weak point, with the result that gender-relevant evidence does rarely feed into and steer the programming process;
- overall, UK regions are found to be the best performers in our sample, and this result seems to be confirmed across the whole spectrum of the policy process. This is a unique case as generally, countries tend to do better in some fields and worse in others, as the German or the Finnish cases illustrate;
- regional programmes in Sweden and especially in Finland show several areas of strength (in the preparation of the programmes, in financial allocation, in monitoring). In both cases, Objective 1 programmes tend to offer more accomplished solutions with respect to gender mainstreaming than their Objective 2 counterparts. However, the disappointing performance of the Danish Objective 2 programme prevents from referring to a successful 'Nordic' cluster;
- there is an apparent clustering of the Dutch and Belgian regional programmes, united by a generally weak performance compared to regional programmes in the other countries reviewed.
- the analysis also showed comparable results achieved by French, Spanish and Italian programmes, yet in different ways. In the Spanish case, Objective 1 regions seem to be performing more strongly while in the Italian and French cases, Objective 2 regions seem to be better at incorporating a gender dimension in programming.
- hence, the differentiated performance recorded by Objective 1 and Objective 2 regional programmes (in one direction or in another) tends to mitigate an envisaged North / South divide differentiating European countries.

It has to be noted that this overall performance reflects what is stated in the priority objectives for Structural Funds Programmes, however it does not represent the stated priority given to the gender mainstreaming itself. For example, the Flanders programme clearly states that reducing the gap between men and women is not a priority since they expect that the positive

trend will be reducing it and does not consider extra effort to be necessary. In other cases, for example the Dutch programmes, only an implicit attention is paid to gender issues.

3.1. Overview of the gender dimension in Structural Funds Regional Operational Programmes

Research questions and methodology

This section compares the performance of the countries under investigation with respect to the integration of gender equality in Objective 1 and Objective 2 regional programmes.

This general assessment is based on a qualitative and comprehensive reading of a sample⁽¹⁴⁾ of Structural Funds programming documents for Objective 1 and Objective 2 regions in nine Member States (see Annex III)⁽¹⁵⁾:

- Austria
- Belgium
- France
- Germany
- Ireland
- Italy
- the Netherlands
- Spain
- the UK

Seven policy dimensions, corresponding roughly to distinct policy phase in the programming process, are identified⁽¹⁶⁾.

A standard ‘fiche’ was elaborated for each Regional Programmes (see the Template Fiches in Annex II)⁽¹⁷⁾.

This source of evidence is complemented by available secondary data, such as national and EU-wide evaluations in order to include in the analysis also countries like Finland, Sweden and Denmark as well as filling the information gap for countries covered in the broad review (see in Annex I), and more generally to compare evidence from different sources with a view to consolidate and validate the results obtained. It is quite clear that this analysis is merely indicative of the general approach followed in Structural Funds interventions, mostly because it is based on stated objectives rather than actual implementation. However it helps identifying some ‘stylised facts’ that are then developed and expanded upon in the next sections.

⁽¹⁴⁾ The sample is composed by 122 Operational Programmes (OPs).

⁽¹⁵⁾ Lack of consistent and public information on programming documents prevented to carry out a comprehensive OPs review for the EU 15.

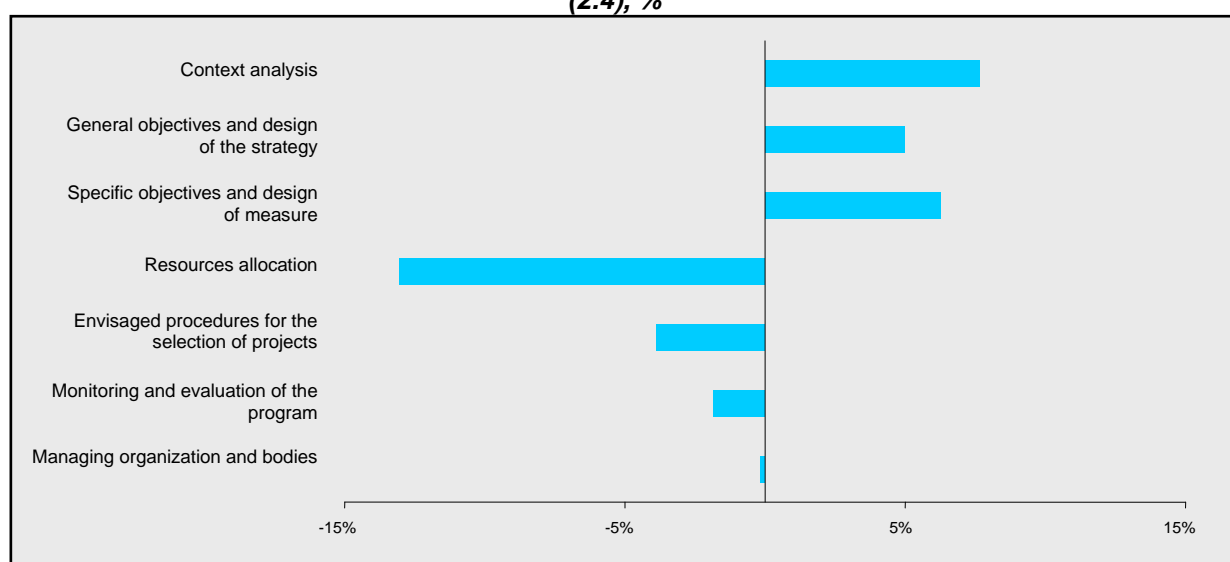
⁽¹⁶⁾ These are: context analysis, general objectives and design of the strategy, specific objectives and design of measures, resources allocation, envisaged procedures for the selection of projects, managing organisations and bodies (involvement or representation of organisations or bodies responsible for equal opportunities), monitoring and evaluation.

⁽¹⁷⁾ For each dimension, the standard fiche comprises a paragraph of qualitative description, and an assessment mark. Three options were possible for the mark according to whether gender equality in the considered dimension is a) deeply considered, b) not deeply considered, or c) not at all considered.

Policy phases and policy areas⁽¹⁸⁾

Chart 5 shows the extent to which gender issues were taken into consideration in each policy phase, compared to overall performance of gender mainstreaming in regional programmes⁽¹⁹⁾. Perhaps unsurprisingly, gender issues are generally better tackled in upstream phases of the policy process (context analysis, determination of general and specific objectives) than in phases dealing with the concrete implementation of the programmes. In particular, consideration for gender issues is badly reflected in resources allocation despite good intentions expressed in earlier programming phases.

Chart 5. Performance in each policy phase. Deviation of each dimension from the mean value (2.4), %



Source: Authors

Objective 1 and Objective 2 regions show broadly similar patterns in this respect. One difference is that Objective 1 regions seem to be better at designing specific measures taking into consideration gender issues, while Objective 2 regions tend to distinguish themselves for lower-than-average attention paid to gender issues in financial resource allocations.

At country level, weaknesses and strengths are differentiated among policy phases.

In **Belgium** the involvement of organisations and bodies responsible for equal opportunities, and to an even higher extent, the resource allocations are policy aspects where the national average in terms of gender mainstreaming is below the overall average level recorded across the different regional programmes reviewed.

⁽¹⁸⁾ As explained above, the assessment of the extent to which gender equality is taken into account in regional Structural Funds Programmes is addressed in seven distinct phases of the programming process. These seven 'dimensions' of the policy process are further grouped into two broad groups: programming phases (context analysis, general objective and design of the strategy, specific objectives and design of measures) and implementing phases (resource allocation, envisaged procedure for the selection of projects, managing organisations and bodies involved, and monitoring and evaluation). The Template Fiche in Annex II lists the specific questions addressed in the fiches to assess the gender dimension along these aspects of the policy process.

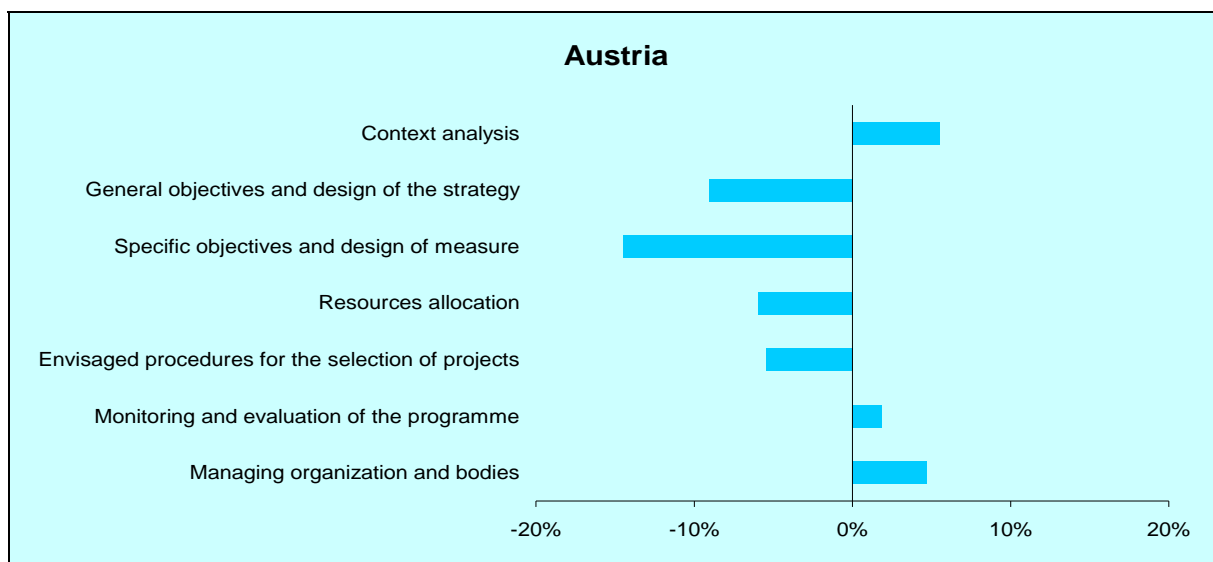
⁽¹⁹⁾ In the charts the vertical axis represents the overall average performance (or mean). In parenthesis is the value of this overall average calculated on the basis of the quantitative values attributed to assessment marks. A positive deviation on the right hand side shows a higher-than-average performance, whereas a negative deviation on the left hand side illustrates a lower-than-average performance.

The **Netherlands** are also underperforming in relation to the different policy dimensions considered, although some reference to gender mainstreaming is generally made when formulating general objectives (Flevoland, and to a lower extent Steden, also consider gender mainstreaming in other dimensions such as context analysis and the definition of specific objectives).

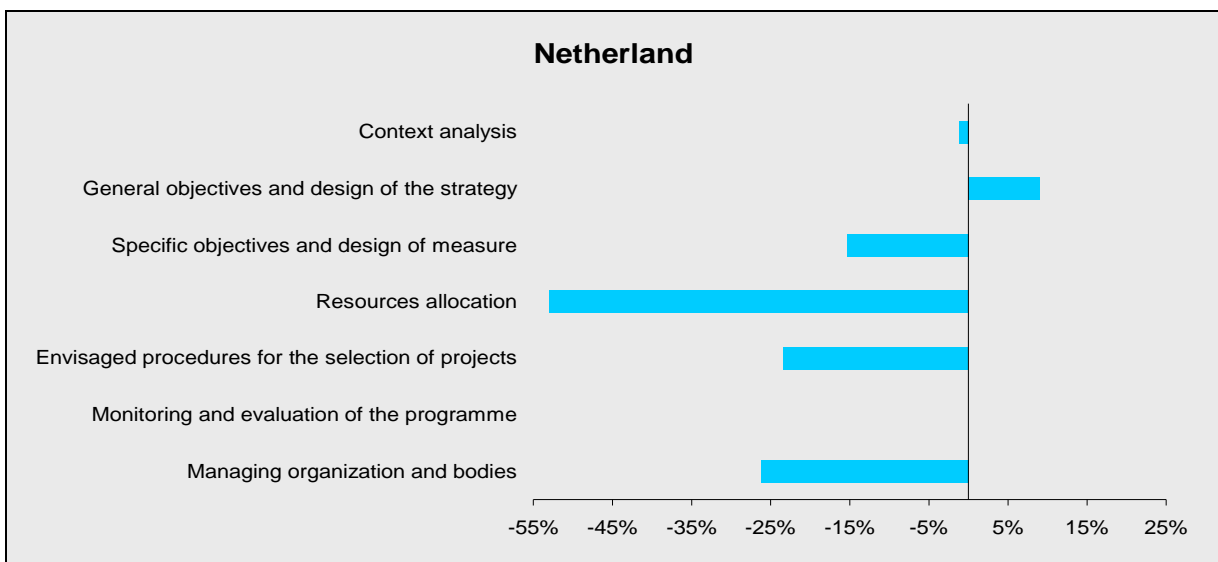
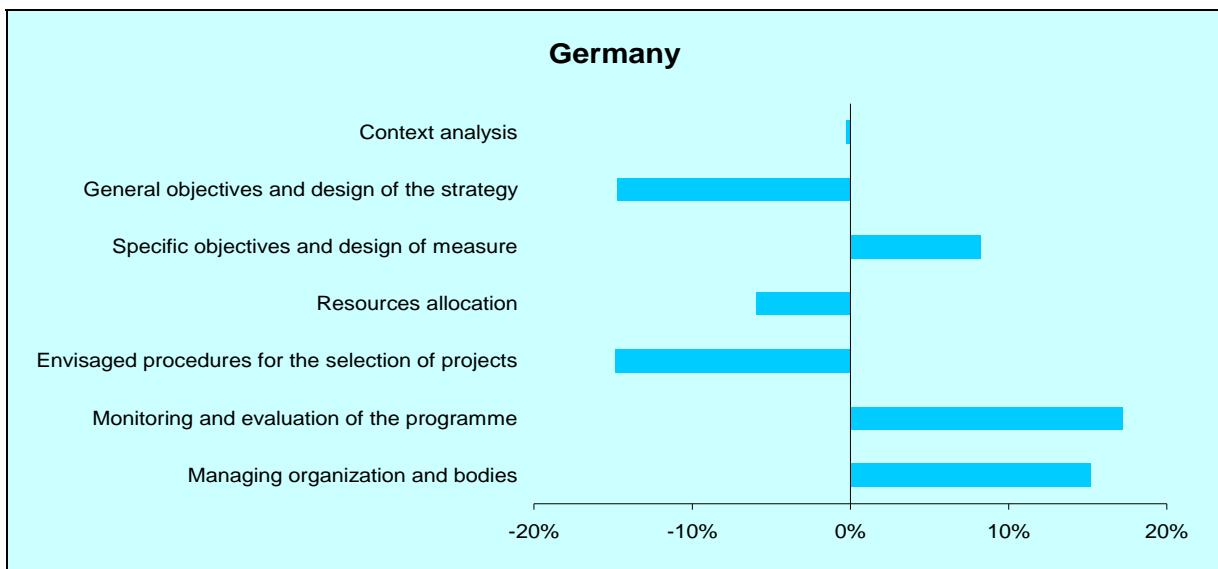
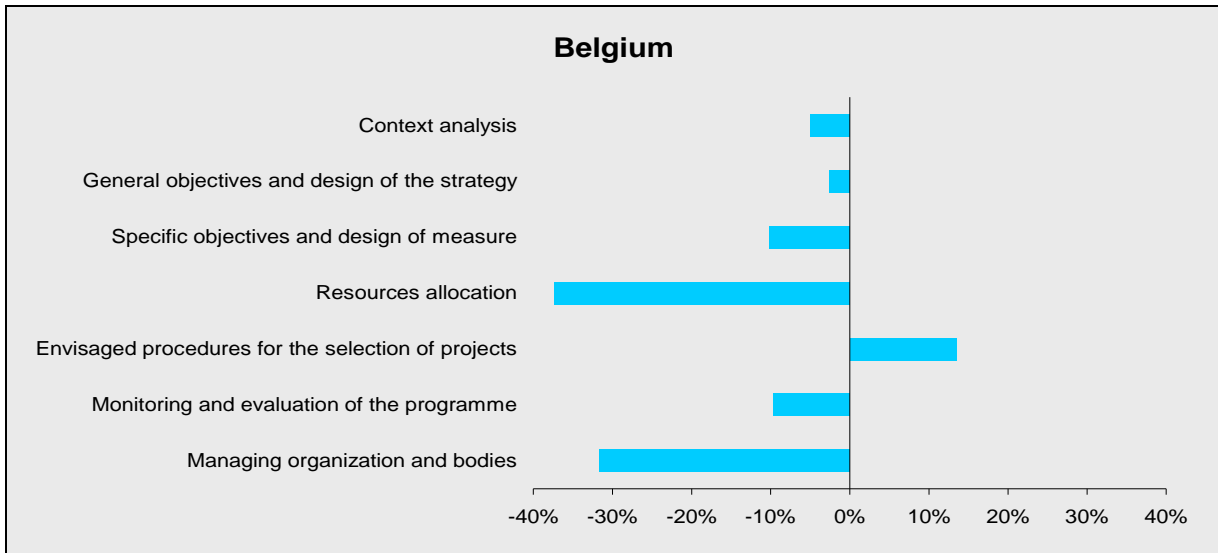
Austrian regions, instead, tend to be weaker on the definition of specific objectives and measures. Interestingly **Spanish, French and Italian** regions apparently share a similar profile of strengths and weaknesses. In particular, they score below overall average as far as the involvement of managing organisations and bodies is concerned, and, to a lower extent, for resources allocation.

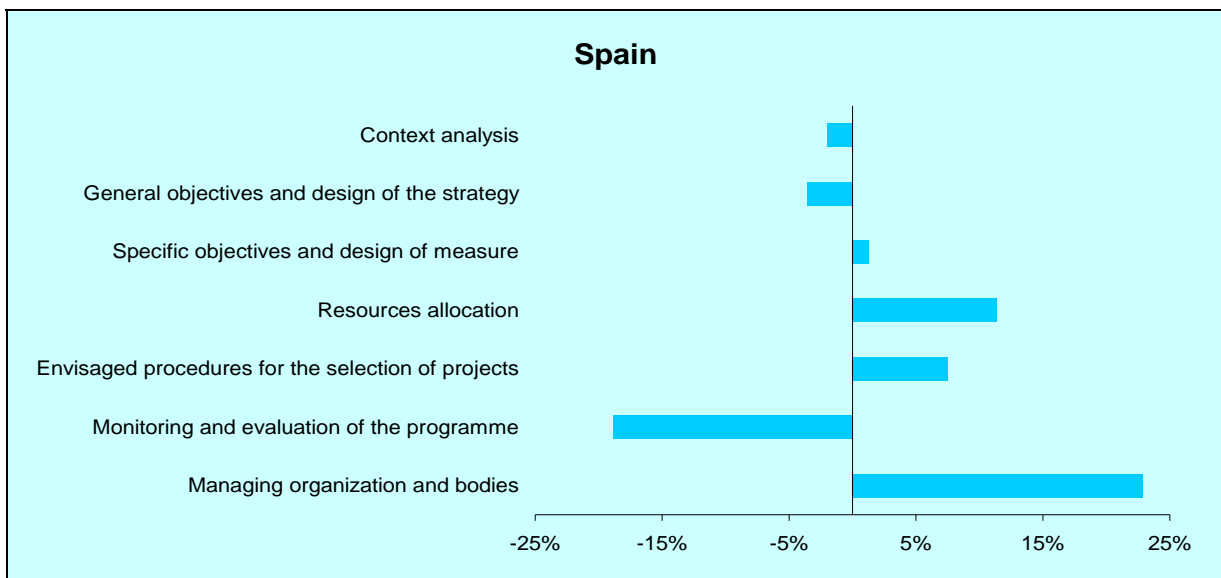
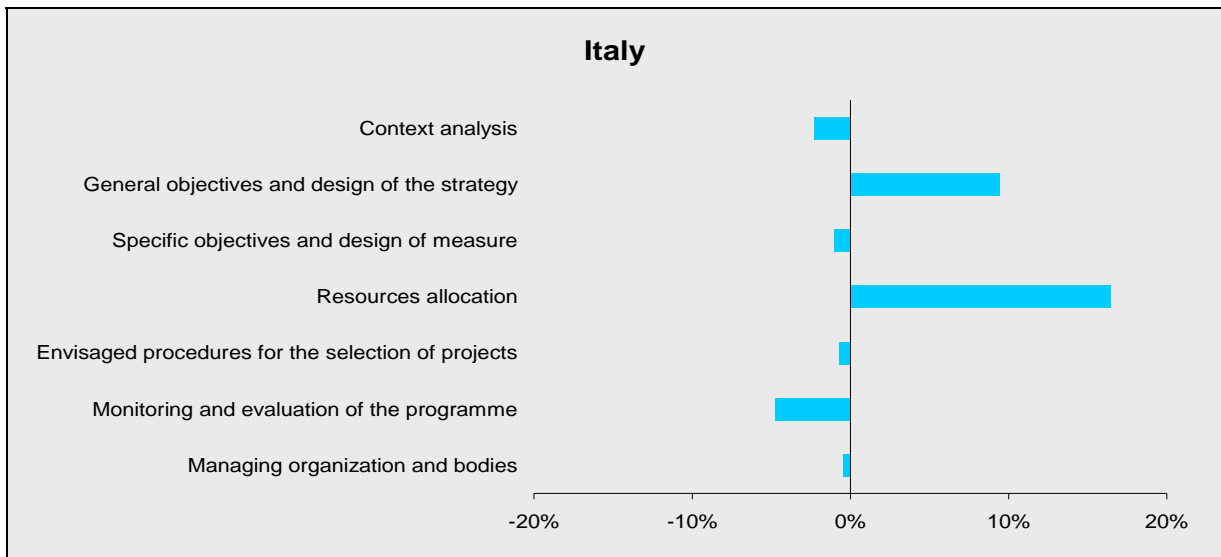
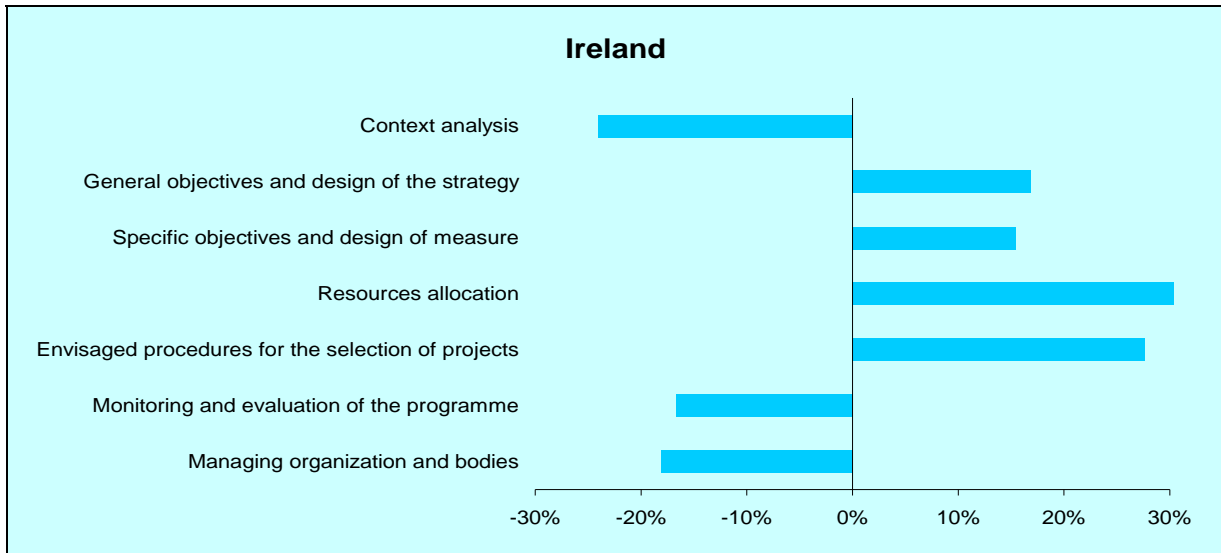
Evidence for **Finland** suggests that mainstreaming in the different aspects of programming also differs for this country, despite overall good performance. Monitoring seems to be (technically) the most successful area, whereas contextual analysis and partnership during programming are the least successful ones from a gender perspective (Finnish Ministry of Labour, 2004). In Objective 2 **Swedish** regional programmes (in particular in the Southern Objective 2 programme), the integration of gender equality seems to be better at earlier programming phases (ex ante evaluation, definition of general objectives), than further down the decision making process (design of specific measures).⁽²⁰⁾

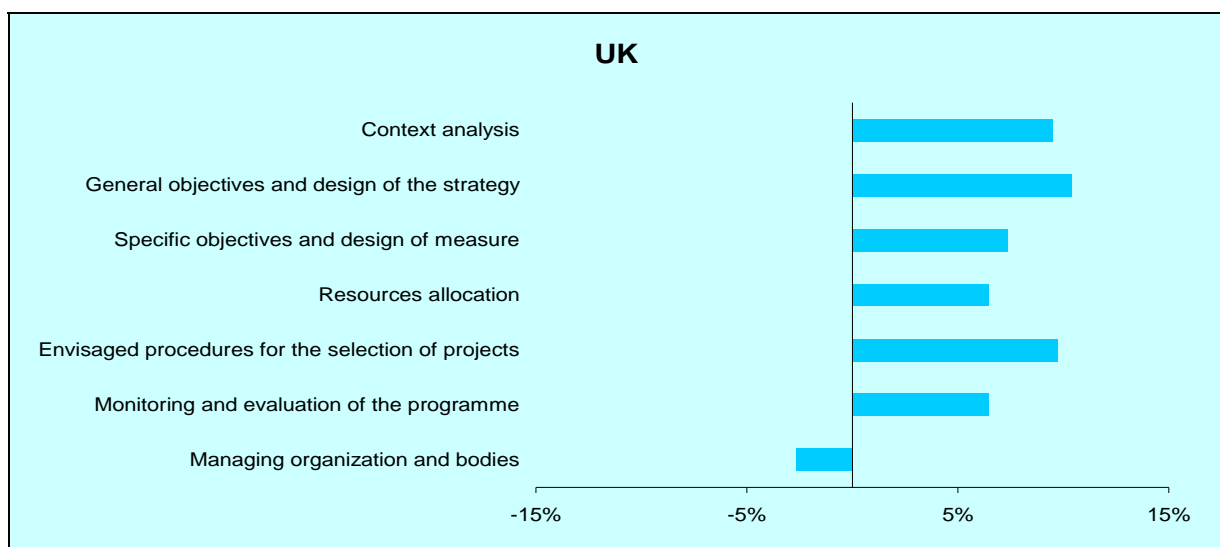
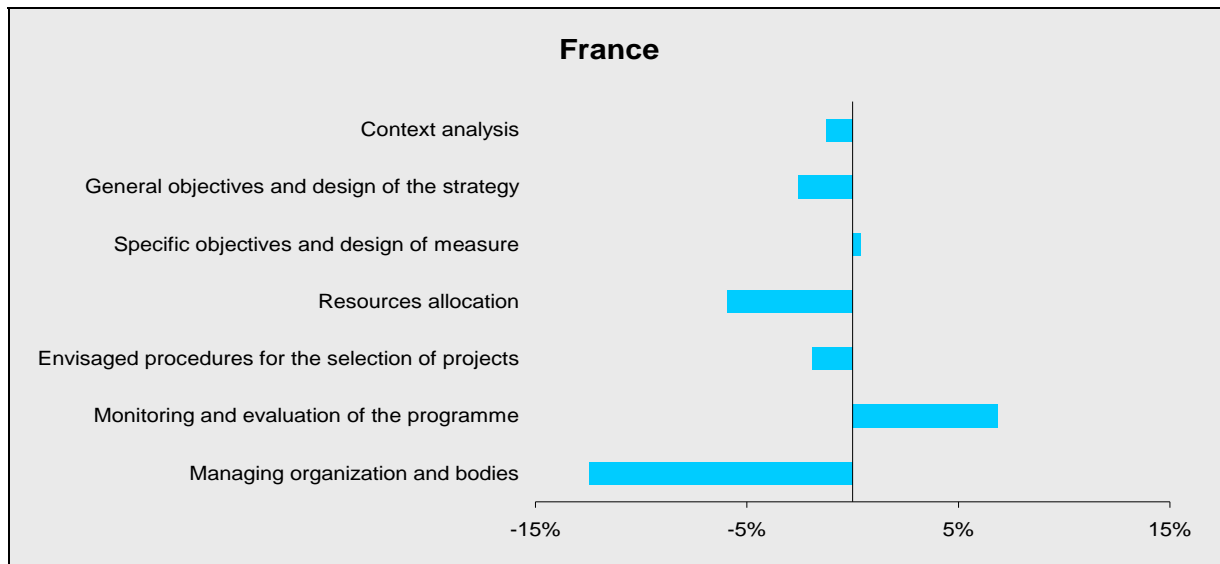
Chart 6. Country performance on policy phases. Deviation from mean value (2.4) by dimension, %



⁽²⁰⁾ See CEC (2004).







Source: Authors

Regional programmes in **Germany** show both strengths and weaknesses. German regions seem to be good at integrating gender issues in monitoring and evaluation activities, but also at involving managing bodies. However, they display lower performance level as far as selection procedures and general strategic design are concerned.

Likewise, the two Objective 1 **Irish** regions reviewed record good performance for the dimensions related to general strategic and specific objectives and selection procedures. Notably, they stand out for taking gender issues seriously into account in the allocation of resources. At the same time, the level of attention paid to gender issues in context analysis, monitoring and evaluation and the involvement of bodies and authorities specialised in gender issues tend to be below the overall average recorded across the regional programmes reviewed.

Finally, **United Kingdom (UK)** regions are remarkable due to their good performance across the policy dimensions spectrum. Context analysis, the determination of general and specific objectives, resource allocation, project selection procedures, and monitoring and evaluation

activities are all aspects of programming and implementation that seem to be characterised by higher-than-average attention paid to gender issues.

Gender mainstreaming in the programming phases

Context analysis

This dimension refers to the extent to which the gender dimension is only addressed when assessing strengths and weaknesses of a region.

One specific aspect of the consideration for gender issues in context analysis has to do with the use of sex-disaggregated statistics. According to a study on the integration of equal opportunities between women and men in Objective 1 & 2 Structural Funds Programming Documents (Engender, 2002), approximately half of the programming documents reviewed refer to sex-disaggregated statistics. Generally speaking, better outcomes are achieved in the case of Objective 2 Regional Programmes. More specifically, French Objective 1 regions, and Irish regions obtain rather weak results. On the contrary, Regional Programmes for Netherlands, Germany and Sweden (to a lower extent, in UK, Austria and Finland) record positive results. Concerning the realisation of specific ex ante evaluations dealing with gender equality, almost all German Objective 2 regions were found to have carried out such ex ante evaluations, whereas in countries like Spain, Italy or France as well as in Greece, these analyses were rarely performed (Engender, 2002).

The two Irish Objective 1 regions as well as the Dutch regions reviewed seem to record bad performance as far as gender-specific context analyses are concerned, while UK and Austrian regions (eight Objective 2 regions and one Objective 1 region, Burgenland) show relatively good performance. In France, Objective 2 regions record an average performance, but Objective 1 regions are apparently characterised by lower level of consideration for equal opportunity when carrying out context analysis. The same can be said about Italian Objective 1 regions, which tend to be weaker than Objective 2 counterparts as far as context analysis is concerned. In Sweden, the two Objective 1 programmes as well as in the Island and Southern Objective 2 programmes present interesting ex ante evaluation. In Finland, with the exception of the Objective 1 North programme, regional programmes tend not to provide contextual analyses of quality (Finnish Ministry of Labour, 2004).

The fact that gender-specific context analyses are carried out does not automatically mean that concrete actions are taken on this basis. An illustration is given by the Swedish Island Objective 2 programme whose ex ante evaluation conclusions tend not to be further taken into consideration in the programming phases. On the contrary, interesting examples on how to establish a link between contextual analysis and strategic implementation are contained in some German, Greek and Italian programming documents, which require that men's and women's participation in measures to combat unemployment be in line with their respective levels of unemployment (ECE, 2006).

Table 1. Selected good examples of gender mainstreaming in context analysis

Programme	Example
Austria Salzburg Objective 2	The SPD contains a SWOT ⁽²¹⁾ (Strengths, Weaknesses, Opportunities, Threats) analysis as well as objective indicators which detail the following points: <u>Women labour force participation rate</u> <ul style="list-style-type: none"> ▪ Rate of unemployed women ▪ Income disparities between women and men ▪ Barriers to job access through infrastructure deficits ▪ Employment shares of women ▪ Wide range of socio-economic indicators concerning education, career situation, political participation etc
UK Highlands and Islands transitional Objective 1	A gender-specific analysis is carried out that considers the following points: <ul style="list-style-type: none"> ▪ employment by industry for males and females and for full and part-time employees ▪ information on average salary levels for males and females in the Highlands and Islands in comparison to Scotland and Great Britain. ▪ Activity rates ▪ Social exclusion and barriers to equal opportunities ▪ Education
UK East Wales Objective 2	Labour market indicators and issues considered with a mainstreaming approach: gender horizontal segregation (representation in different industries), vertical segregation (different level in the same industry), contractual segregation (part-time working) and pay gap. Reconciliation of work and family life and lack of provision of support services (e.g. the level of childcare provision)
France Provence Alpes Côte d'Azur Objective 2	The analysis of the programme context includes a general picture of the equality between men and women in the European Union. A part of the programme itself is dedicated to the 'difficult situation of women' in the region. Thus special attention is paid to the specific situation of women in the region of Provence – Alpes – Côte d'Azur. <u>Gender-relevant issues/indicators:</u> <ul style="list-style-type: none"> ▪ labour market indicators and studies ▪ structure of the labour market ▪ demographic analysis ▪ socio-economic analyses ▪ life-long learning and its relation with sustainable development. <u>Gender-specific indicators and studies:</u> <ul style="list-style-type: none"> ▪ women's entrepreneurship ▪ (un)employment rates, differentiated according to sexes ▪ role of women in rural areas

Source: Grids for Structural Funds OPs assessment (see Annex III)

General objectives and design of the strategy

The review found that just over half of the documents made some mention of general objectives concerning equal opportunities between men and women. In the sample, UK, Objective 2 Italian and Irish regions seem to be the most active in taking gender issues seriously when defining the general objectives and design of their regional programmes strategy. Interestingly, despite overall weak performance, Dutch regions also tend to perform above average along this specific policy dimension.

As to German, Austrian and Belgium regions, they tend to be less concerned with gender issues at this stage of the programming process. In the case of Austria, however, it is worth stressing that the one Objective 1 region (Burgenland) records rather good performance. In

⁽²¹⁾ SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis is an evaluation tool which is used to check whether a public intervention is suited to its context and it helps structure debate on strategic orientations (European Commission, *Means Guide. Evaluation of Socio-Economic Development*). It was developed 50 years ago to help firms define their strategies in the context of fluctuating and competitive environments. This decision-making tool owes its name to the fact that it examines the strengths and weaknesses within the firm, as well as the opportunities and threats of the market. The tool is now frequently used as a component of the planning and ex ante evaluation of regional development programmes.

Finland, and more specifically in the Objective 1 East and the Objective 2 West programmes, objectives set are very wide and transversal across the priorities. It is also interesting to recall, in the case of the Finnish East programme, that the integration of gender issues into programming was apparently helped by the creation of a gender equality project and the engagement of a project coordinator who supported and assessed the integration of gender issues in the programme preparation.

Table 2. Selected examples of gender mainstreaming in the general objectives and strategy design

Programme	Example
<p>Sweden Island Objective 2</p>	<p>Equality of opportunities is important for the region's development. As the analysis shows, women are in a more exposed situation in the region. Special measures are needed to strengthen their position. These apply both to their general position on the labour market, gender segregation on the market and to education.</p> <p>Make use of the human resources, increase cooperation and carry out special measures to increase equality between men and women. Activities as a whole will be concentrated on two priorities:</p> <ul style="list-style-type: none"> ▪ Attractive living environment and development of the economic sector ▪ Development of human resources <p>The equality aspect must be integrated into all areas and levels in the programme. In addition, it is important that special action be taken in projects supported by the plan to strengthen the position of women on the labour market, increase female entrepreneurship and increase women's participation in local and regional development employment.</p> <p>Overall, the general equality objective for the entire programme is to break down gender segregation on the labour market and in education and achieve balance with regard to gender and age distribution.</p>
<p>Italy Toscana, Objective 2</p>	<p>The general design of the strategy is focused on sustainable development, and equal opportunities principle as horizontal priorities. Gender equality principle is systematically integrated in all OP stages. The general strategy explicitly considers the gender dual approach: a) positive actions, b) integration of gender mainstreaming principle as horizontal priority, in coherence with European legislation and Strategic Gender Impact Assessment of Equal Opportunities (Valutazione dell'Impatto Strategico sulle Pari Opportunità-VISPO)⁽²²⁾ guidelines, elaborated by National Department for Equal Opportunities. General gender-relevant and sensitive objectives are:</p> <ul style="list-style-type: none"> ▪ promotion of women's participation in the labour market and in new economic activities, also through local development projects; ▪ promotion of better living conditions for women, through efficient care and community services; ▪ promotion of better and more flexible working conditions in order to promote work and life balance. <p>The focus is on the promotion of women's and young people's entrepreneurship, women's participation to economic activities, social economy, community services, care and family-friendly policies and services. In general, interventions to promote some economic sectors such as services, tourism, the promotion of environmental and cultural resources, where there is a specific concentration of women's workforce, can have a positive impact above all on women's employment, as long as innovative sectors and services relate to Information and Communications Technology (ICT) instruments.</p>
<p>UK East Midlands, Objective 2</p>	<p>The objective of the equal opportunities thematic priority is 'To increase the take up of opportunities generated by the programme by women, and ethnic minorities and people with disabilities'. Three objectives have been agreed:</p> <ul style="list-style-type: none"> ▪ To support women, ethnic minorities and people with disabilities who suffer from exclusion, to access training and employment opportunities generated by the programme ▪ To increase the number of women, ethnic minorities and those with disabilities accessing training and employment in higher paid and higher skilled occupations and sectors where they are under-represented. ▪ To increase the number of women, ethnic minorities and those with disabilities participating in the management and implementation structures of the programme.

Source: Grids for Structural Funds OPs assessment (see Annex III)

⁽²²⁾ In 1999 the Equal Opportunities Department defined a Gender Impact Assessment Model with the main purpose of helping national and local decision-making actors in planning Structural Funds in order to adopt a gender perspective.

Specific objectives and design of measures

This dimension refers to the extent to which the stated general objectives explicitly mention gender-relevant issues.

Setting targets associated with specific objectives is one way to ensure that objectives will be followed. At the beginning of the programming period, it was estimated that just **one in eight Objective 1 and Objective 2 programme documents made detailed reference to quantified targets with respect to specific objectives dealing with equal opportunities** (Engender, 2002). Examples of such quantified objectives include a reduced gender gaps in unemployment or remuneration, an increased proportion of female managers or entrepreneurs, etc.

Finnish regional programmes (whether Objective 1 or Objective 2) provide good examples with respect to target setting. As an illustration, the Objective 2 programme for South Finland proposes two quantified targets: a) new enterprises created by women should be 30%, and b) the unemployment rate of women should be the same as men's at the end of the programming period. Some other regional programmes in Germany and in the UK are also said to include specific quantified objectives. Table 3 illustrates some examples of specific measures of relevance to gender equality, some of which associated with quantified targets.

Whereas Irish, UK and German regions are generally better at tackling gender issues in specific measures, their Austrian, Belgian, Dutch and Italian counterparts feature levels of attention for gender issues that tend to be below average.

Interestingly, in the UK as in Germany, Objective 1 regions seem to record better results than Objective 2 regions along this dimension. The same occurs in Spain where Objective 1 regions perform better than Objective 2. On the contrary, in France, the weak overall level is almost entirely explained by the bad performance of Objective 1 regions when devising specific objectives that integrate a gender dimension.

Table 3. Selected examples of gender mainstreaming in the specific objectives and measures

Programme	Example
Germany North Rhine Westphalia, Objective 2	Women are explicitly considered as target population of specific objectives and measures, in particular in the employment policy: <ul style="list-style-type: none"> ▪ Specific support to women to increase qualification ▪ Facilities to increase self employment ▪ Small and Medium Enterprise (SME) support for family friendly environment ▪ Education for young women ▪ Stimulating the regional health industry (with a high share of employed women) Target groups are single mothers, young women (education), unemployed women, women with qualification deficits, women who want to return to work after birth and child education, women with an academic background.
Germany Bremen, Objective 2	Women are explicitly considered as target population. Specific objectives and measures are linked with gender-relevant objectives. Specific objectives are: <ul style="list-style-type: none"> ▪ support to single mothers ▪ installation of a helpdesk for a better co-ordination between job and family ▪ financial support for SMEs creating jobs for women ▪ education and training measures for young women ▪ support for return to jobs ▪ financial and consulting support for (unemployed) women starting new business

Programme	Example
<p>Ireland Border Midlands and Western Region, Objective 1</p>	<p>In each measure there is a reference about equality effects (neutral/positive). In some cases gender target are set. Measures in the following priorities are expected to have an impact on gender equality:</p> <ul style="list-style-type: none"> ▪ Local infrastructure Priority. Measures: Non-national roads, Urban and Village Renewal, Rural Water measure, E-Commerce and Communications ▪ Local enterprise development Priority. Tourism, Micro-Enterprise, Entrepreneurial and Capability Development (targets set: No. of female recipients of training: 1710, No. of participants on training courses achieving recognised certification: 2250), Forestry Development Sub-measure ▪ Agriculture and rural development Priority. Area-Based Rural Development Initiative Sub-measure, Sub-Measure Rural Development Fund ▪ Social inclusion and childcare Priority. Childcare, Equality, Community Development and Family Support, Crime Prevention, Youth Services, Local Development. Examples of performance indicators and targets set for this priority: <ul style="list-style-type: none"> – increase in 50% in number of childcare places; – number of childcare workers supported (disaggregated by gender): 800; – no. of projects assisted to advance gender equality in Labour market; – decision making, Family friendly polices; – gender proofing of personnel policies: 60.

Source: National Programmes Fact sheets (see Annex III)

Gender mainstreaming in programme implementation

Resources allocation

In connection with the practical achievement of policy concerns for gender issues, as reflected in resources allocation, the Dutch and Belgian regions are weak in this dimension. Among Belgian regions, the Objective 1 Hainault is underperforming, while Limburg is the only Belgian region where resource allocation is shown to take gender mainstreaming objectives into consideration. On the face of it, the two Irish regions are effective in integrating gender issues in their spending decisions. Italian, UK and Spanish regions record above average levels of considerations for gender issues in financial allocation, while the reverse seems to be true for Austrian, German, and French regions. In the case of French regions, again, results characterising Objective 1 regions worse than for Objective 2 regions are found, while the reverse is true for Spanish regions (Objective 1 regions showing better results than Objective 2 regions).

Table 4. Budgetary allocation for measures specifically targeted at equal opportunity⁽²³⁾

Operational Programme	% of total programme budget (2000)
Germany Objective 1	
Berlin	2.04
Brandenburg	2.08
Saxony Anhalt	1.73
Saxony	2.27
Mecklenburg Western Pomerania	2.4
Thuringia	2.51
Spain Objective 1	
Discrimination	5.82
Andalucia	1.48
Asturia	0.30
Canarias	0.64
Cantabria	1.24
Castile and Leon	0.47
Castile la Mancha	0.99
Ceuta	2.45
Extremadura	0.30
Melilla	1.72
Murcia	0.67
Galicia	0.96
Valencia	0.65
Sweden Objective 1	
Norra Norrland	4.46
Södra skogslänsregionen	2.71
Greece Objective 1	
Attica (M.3.3)	1.23
Crete (M6.1)	3.05
North Aegean (M1.5)	2.74
South Aegean (M4.2)	1.65
Epirus (M5.1)	2.85
Continental Greece (M5.2)	1.72
Ionian Islands (M5.3)	2.8
East Macedonia – Thrace (M5.4)	2.49
Peloponnese (M5.3)	1.5
Thessaly (M5.3)	1.84
Italy Objective 1	
Scientific RTD (MIII.6)	0.3
Local Development	0.94
Sicily (M3.12)	1.07
Apulia (M3.14)	0.95
Calabria	1.02
Basilicata (M111.1.E.A)	1.7
France Objective 1	
Martinique	0.2
Guyana	0.13
Austria Objective 1	
Burgenland (M5.5)	0.9%
Germany Objective 2	
North Rhine Westphalia	1.49
Schleswig Holstein	1.57

Source: Engender (2002)

⁽²³⁾ When no evidence is reported in Table 4, it means that no budget allocation is made in favour of gender-specific measures (but it can also represent cases where no evidence is available).

In Italian Objective 1 regions, the amount dedicated to equal opportunity measures represents 10% of ESF funding. Overall, gender dedicated measures represent a marginal share of total programmes' budget. However, in Germany and even more so in Sweden, specific measures have a bigger budget than in Spain.

Finally, in a few cases, an overall spending target is identified for gender equality projects (or mainstreamed projects) supported across measures and priorities. In Finland, for example, gender equality is considered a proper horizontal priority. The two Objective 1 programmes aim to ensure that 6% and 5% respectively of total funding is allocated to gender equality projects, while the share is 25% and 6% respectively for the South and West Objective 2 programmes.

Envisaged procedures for the selection of projects

Another way to assess whether gender mainstreaming objectives find a concrete materialisation is by looking at the projects selection procedures adopted across the regions reviewed. **Examples of 'gender-sensitive' selection criteria comprise criteria dealing with planned output (e.g. targets for women's participation), project subject or content (specifically addressing women's needs), or flanking measures (facilitating women's access to projects and beyond, to the labour market).**

Gender sensitive selection criteria

- in many Member States, a 'soft' approach to gender-sensitive criteria was adopted. This means that projects fulfilling the criteria would see their chance of being selected increase (e.g. Belgium-Flanders/Brussels, Germany, some regions in France, Ireland, Portugal, United Kingdom);
- less frequently, the fulfilment of some criteria is compulsory (e.g. Austria, Greece, Italy, and Spain)⁽²⁴⁾;
- in Denmark, the incorporation of the gender mainstreaming aspect in a project could be required if it contributed to the project quality and overall objectives of the programme. However, it is not clear how effectively enforced this requirement was (CEC, 2006);
- in a few cases, gender mainstreaming was not at all taken into consideration during project selection (e.g. the Netherlands, or some regions of France).

Distinguishing between Objective 1 and Objective 2 regions in France, Italy and Spain tend to show higher-than-average results for French and Italian Objective 2 regions, and for Spanish Objective 1 regions. This is broadly confirmed by a review of Objective 1 and Objective 2 programming documents, according to which Objective 1 regions in France and Italy appear to be weak, while to some extent Objective 1 regions in Greece, Portugal and Spain record a better performance. Also, regions (whether Objective 1 or Objective 2) in Finland, Germany and the UK present overall rather good results (Engender, 2002). In Sweden, all the programmes use gender-relevant criteria, except the Norra Objective 2 programme. In the Västra programme, for example, gender equality is one of the eight selection criteria; each project application has to state how it will contribute to increased gender equality.

Just over half of the programmes reviewed mention the use of devices to ensure gender equality in priorities and measures (e.g. criteria and procedures for appraising and selecting

⁽²⁴⁾ For example a Swedish Objective 3 programme required proposals to describe the expected impact for each gender.

projects, or special support to projects that contribute positively to gender equality). This is particularly true in the case of German, Finnish and British regional programmes. Objective 2 programmes in Austria and France are also doing some interesting efforts in this direction. On the contrary, Swedish programmes as well as Italian programmes record mediocre results. The same applies to Objective 1 regions in France, Greece, Italy and Portugal.

Table 5. Selected good examples of gender mainstreaming in project selection procedures

Programme	Example
Belgium Limburg, Objective 2	<p>Whether a project is eligible or not for funding is among others determined by its gender sensitiveness. It is clearly stated that projects that promote equality between men and women are preferred over those that do not pay attention to the gender issue. Projects 'have to' contribute to sustainable development and to the equalisation of the rights of men and women on the job market.</p> <p>A checklist on equal opportunities has to be completed during the application for the programme. The checklist (an official part of the project-application) lists a number of items that have to be verified in the light of each measure.</p> <p>Concerning the part of the funds that are co-financed by the Limburg province, the programme states that priority is given to project that focus on the improvement of employment rates for those target groups that have a relative low participation in the employment process (women, low qualified, unemployed, disabled people etc. are given as examples).</p>
Spain Castile and Leon, Objective 1	<p>Envisaged procedures for the selection of projects take gender issues deeply into account.</p> <p>In details:</p> <ul style="list-style-type: none"> ▪ Selection criteria explicitly promote women into the project choices ▪ There are many mainstreaming interventions regarding the gender issue
UK East Midlands, Objective 2	<p>A number of mechanisms are considered:</p> <ul style="list-style-type: none"> ▪ completion of an equal opportunities questionnaire by all project sponsors ▪ inclusion of equal opportunities targets within project grant approvals ▪ additional weighting in the selection criteria for projects which involve a high proportion of targeted group beneficiaries <p>The Programme Monitoring Committee (PMC) will also consider modulation of grant rates for projects where a high proportion of beneficiaries are from targeted groups. The appraisal of operations seeking co-financing from Structural Funds and which are not specifically oriented towards the improvements of equal opportunities, should include an assessment of their impact on equal opportunities.</p>

Source: Grids for Structural Funds OPs assessment (see Annex III)

Managing organisations and bodies

One aspect of incorporating the gender dimension into the programming process concerns **the involvement and/or consultations of organisations or authorities responsible for gender equality in the design of the strategy and its implementation**. The issues as to whether such organisations are represented within Managing Authorities, and if the latter can access expertise in the field of gender mainstreaming are also of specific relevance.

Also, a widespread practice consists in creating working groups on gender equality associated with the Monitoring Committee and/or programme management. However, representation at the Monitoring Committee of organisations dealing with women's interest and balanced representation of women and men in monitoring committee are principles not always fully applied.

As far as the involvement of authorities or bodies in charge of equal opportunities in the programming process is concerned, positive results are found in Spanish regions and to a lower extent in German and Austrian regions. On the contrary, Belgian, Dutch, French and Italian regions are below the overall average level of involvement of gender-related

authorities and bodies. Interestingly, Irish and, to a lower extent, UK regions are found to be weak in this specific field, despite overall positive performance along the other dimensions of the policy process. In Finland, consultation with bodies and organisations representing women's interests during the preparation of the programme is often mentioned in programming documents. Swedish programmes perform comparatively less well on working groups related to Monitoring Committee, except for balanced representation at monitoring committee which is an objective explicitly called for.

In general and aggregate terms, respectively 22% of Objective 1 and 60% of Objective 2 regional programmes made an effort to consult organisations or bodies responsible for promoting gender equality. Only 20% of programme documents mentioned the objective of securing balanced participation of men and women in Monitoring Committees, and just 15% gave a convincing statement suggesting that these objectives will be followed by results.

Clear and precise indications of the involvement of equality organisations in Monitoring Committees can be found in Germany⁽²⁵⁾ and in the UK⁽²⁶⁾ (Engender, 2002).

Evidence concerning the specific question as to whether training in gender equality issues was planned for programme managers and/or members of the Monitoring Committee shows the rather low commitment made in this respect by the regional programmes reviewed. Just German and UK regions apparently did some effort in this direction.

Managing bodies in the ESF

According to a synthesis of ESF evaluations realised by DG Employment dealing with the ESF component of Objective 1, Objective 2 and Objective 3 programmes,⁽²⁷⁾ gender equality or equal opportunities working groups that prepare the work of Monitoring Committees in this field are often mentioned in programming documents. The report notes also efforts made to include representatives of bodies promoting gender equality or experts in the Monitoring Committees of Regional Programmes, and the fact that, nominal or formal representation of the official institutions competent for gender issues in Monitoring Committees is often achieved. However, whether these took effectively part in the Monitoring Committees' activities (and whether the latter had a decisive role in the policy cycle) is not clearly evidenced. There is also a general commitment to achieving the gender balance of Monitoring Committees across regional programmes, as well as to gather appropriate expertise in this field as widely proven by the review of OPs fiches. However, again, there is little evidence on the actual composition of such Monitoring Committees, and the impression is that written statements were not necessarily and systematically followed by effective results.

Finally, complementary approaches like the development of guidance notes, tools, websites or trainings for project promoters are detected in some regional programmes (in Belgium, Greece, Germany, Sweden, the UK as well as in France). In fewer cases methodological support was taken one step further with the definition of criteria for quality checks and the establishment of quality control mechanisms specific to gender mainstreaming like in Germany (CEC, 2006).

⁽²⁵⁾ For example: Objective 1 regional programmes for Berlin, Brandenburg, Sachsen Anhalt, or Objective 2 regional programmes for Bavaria, Niedersachsen, Hamburg, North Rhine Westphalia, Schleswig Holstein.

⁽²⁶⁾ Objective 1 regional programmes like in South Yorkshire, West Wales and Valleys.

⁽²⁷⁾ However, the emphasis tends to be on Objective 1 and Objective 3 programmes as DG Employment is the DG in charge for these programmes.

Table 6. Selected examples of gender mainstreaming in managing authorities activities

Programme	Example
Spain Aragon, Objective 2	Managing organisation of the programme deeply takes into account gender issues. Authorities responsible for equal opportunities have been involved in the design of the strategy, monitoring and evaluation, and bodies in charge of equal opportunities issues at the Managing Authority.
Germany Lower Saxony, Objective 2	<p>Authorities who are responsible for equal opportunities are involved in the design of the</p> <ul style="list-style-type: none"> ▪ strategy, monitoring and evaluation systems ▪ design of selection criteria. <p>Co-operation with the representation of local 'Women's Offices' (Frauenbüros) incorporates expert knowledge concerning gender mainstreaming issues. Their representatives are member of the Monitoring Committee.</p>
Germany Berlin, Objective 1	There is expertise on equal opportunities and gender mainstreaming issues at the Managing Authority. All New Länder have set up an expert working group concerning gender mainstreaming. The 'Gender Mainstreaming Board Berlin' is the forum that discusses the implementation of gender mainstreaming into structural funds policies as well the workgroup 'Women and Economy'. The Gender Mainstreaming Board sends one representative to the Monitoring Committee.
UK East England, Objective 2	In the East of England programme, an Equality Advice Group was established as a sub-group of the Structural Funds Strategy Group (SFSG) (i.e. Programme Monitoring Committee). It is expected to advise the SFSG on integrating equal opportunities into the programme. In particular the group is expected to make recommendations on how equal opportunities elements of the programme should be implemented, including issues related to the appraisal and endorsement of projects and to advise on monitoring and evaluation methodologies. Members of the Group will be selected to enable representation of gender, ethnic and disability groups as well as representatives from each of the Structural Funds programmes in the East of England. The chair of the Equality Advice group will also be a member of the SFSG and will act as the equal opportunities spokesman at SFSG meetings.

Source: Grids for Structural Funds OPs assessment (see Annex III)

Monitoring and evaluation

Consideration for equal opportunities objectives in monitoring and evaluation activities is well promoted in German regional programme, as well as in UK and French programmes (with Objective 2 programmes faring better than Objective 1). The attention for gender issues seems to be less of a priority in the monitoring and evaluation activities carried out by regional programmes in Spain, Belgium, Ireland, and, to a lower extent, Italy.

In general, there seem to be large differences between Member States in terms of the extent of collection and usage of indicators dealing with gender equality. Sex disaggregated data tend to be collected in programmes but not always for all measures/actions (see Table 7 for some concrete illustrations). Gender-specific indicators are found in approximately half of the programming documents reviewed, but they are seldom associated with quantified baseline or final targets:

- the four Finnish regional programmes are characterised by excellent records in this respect;
- some good results are also registered in Austria (Objective 2 regions), Germany (Federal Transport Programme), and to a lower extent in UK;
- in Sweden, on the contrary, regional programmes make little use of gender-specific indicators, as well as Objective 1 regions in Ireland and Portugal;

- Greek Objective 1 programmes are also characterised by poor efforts towards the definition of sex-disaggregated indicators (Engender, 2002).

Whether pertinent data is available is one thing, whether it feeds back into the policy process is a different matter. Information available paints a diverse picture in terms of approaches. In some cases, gender-sensitive monitoring is considered a significant tool on its own (e.g. in Belgium-Flanders, France). In other cases, a more pro-active system is formally in place with plans and working documents adjusted according to monitoring or evaluation results (e.g. Sweden). In practice information is not systematically collected at project level, indicators are not appropriate and follow up is inadequate. These appear to be problems common to most programmes (CEC, 2006).

Table 7. Selected examples of gender mainstreaming in monitoring and evaluation activities

Programme	Example
<p>UK London, Objective 2</p>	<p>A set of performance indicators has been designed which enable to follow the gender dimension in monitoring and evaluation. For example:</p> <ul style="list-style-type: none"> ▪ Where a performance indicator measures the number of people participating in an activity, it is monitored whether those people are women, black or ethnic minority or disabled. ▪ Where a performance indicator measures the number of organisations or small businesses participating in an activity, it is monitored whether those organisations are owned, controlled and operated by at least 51% of people from any one equal opportunities target group. This helps show how many women's organisations, disabled people's organisations or black and ethnic minority organisations we are assisting. <p>In other cases guidance is given about how to implement good equal opportunities practice when using a performance indicator. For example:</p> <ul style="list-style-type: none"> ▪ Where a performance indicator measures the number of jobs created, we require and monitor the use of equal opportunities practice in job design and recruitment. ▪ Where a performance indicator measures land developed, we monitor the use of equal opportunities practice in the way you find and contract with your land developers and builders.
<p>UK West Wales, Objective 1</p>	<p>Headline targets are set as follows:</p> <ul style="list-style-type: none"> ▪ 30% of start-up SMEs to be owned by women ▪ 50% of higher-level training places to be taken up by women ▪ to increase female participation rates in the labour market to 70% (from 67%) <p>These targets provide the framework against which the success of the programme can be assessed. Project manager are required to make routine monitoring returns and to report against the target set out in their approval letter. In particular, for some of the measures they are asked to provide a breakdown of beneficiaries by gender, age, use of the Welsh language, whether from an ethnic minority, or disabled.</p> <p>Monitoring Committee includes equal opportunities representatives and deals with the procedures and arrangements for selecting individual projects and actions, including the selection methodology and the operational selection criteria. The Managing Authority will produce statistics disaggregated by gender on the basis of available data. It will also ensure that evaluations measure the extent to which the principle of promoting equal opportunities has been taken into account in the implementation of this programme, with particular regard to the involvement of women in general measures and to the implementation, the relevance and the outcome of such measures. It intends to develop, where appropriate, adequate evaluation procedures, tools and indicators to this end. The annual and final implementation reports will contain a specific chapter describing the actions taken in the framework of the programme in order to ensure the implementation of equal opportunities objectives of the programme, and to state to which extent the targets set out in the programme have been met.</p>

Programme	Example
<p>France Languedoc Roussillon, Objective 2</p>	<p>Indicators associated with measures. are linked to a second category of indicators which measure the extent to which measures contribute to create new jobs, to promote equal opportunities and to achieve environmental objectives. Examples of such indicators include, at regional level: % of companies managed by women, % companies created by women in both eligible and non eligible region, % of funding aimed at family-friendly measures to help remove obstacles to professional development (funding to increase women skills, funding for local services benefiting women etc). Impact indicators include: hiring women professionals, number of women stagiaires, etc.</p>

Source: Grids for Structural Funds OPs assessment (see Annex III)

3.2. Gender mainstreaming and Structural Funds policy cycle: activities, results and lessons for future periods

As seen, even if gender mainstreaming is nowadays an obligation within Structural Funds, its application varies considerably from one state or to another region. For certain countries, for example, equal opportunities between men and women are only considered as a general objective, without indications on how it should be applied (which actions to implement) or considered (the strategy to adopt) within a Community Programme. In other countries, equal opportunities are taken into consideration only in relation to specific actions within dedicated measures and gender mainstreaming remains at a theoretical level only.

The importance of distinguishing between equal opportunity policies (direct policies) and mainstreaming policies (indirect policies) assumes a strategic importance, especially in connection to Objective 1 and 2 programmes. Indeed, the perspective of gender mainstreaming, promoting equality between men and women by incorporating a gender perspective into all policies and all policy levels and stages, implies, at an operational level, a strategy that is particularly functional to those programmes, measures and interventions that do not consider individuals as main targets (as does the Objective 3 ESF). This means that within all those programmes financed by ERDF, FIFG, EAGGF funds, it becomes essential to recognise that women and men do not have the same resources, needs and preferences and that most structures, systems and policies are not gender-neutral, simply treating men's experience as the norm. By taking care of these different needs and situations, policy makers may ensure a better targeting of policies, a more effective delivery and greater equality in all the policies financed by the Structural Funds.

The shift from a simple analytical approach of the *female condition* to a more complex incorporation of the *gender perspective* into all aspects and policies, still poses great difficulties, especially in the programme and measures not financed by ESF. It entails the shifting to a new approach in relation to programmes and policies in which gender aspects may represent an essential element if 'looked at' with a gender perspective.

The permanent difficulties in programming outside of specific axes and measures aimed at improving female employment are a concrete sign of **a still scarce dissemination of a gender mainstreaming approach in programming actions or policies aimed at systems and infrastructures, rather than at individual and specific beneficiaries**. Unfortunately, the general feeling towards gender is still one of scepticism in relation to its true effectiveness and importance: those who work on these issues often have a feeling of marginalisation or, in the worst case, of imposing 'something that has to be done'.

Undoubtedly, developing such approaches and strategies requires time and at a general level, the programming period 2000-2006 has been particularly relevant for the evolution of gender policies and approaches. As seen in the first chapter of this study, the introduction of gender mainstreaming and the possibility of using the dual approach in dealing with different policies has created numerous possibilities, both in the programming and in the implementation of policies capable of promoting equal opportunities between men and women. In this case the impetus provided by Structural Funds together with the emphasis given to good governance, in which the decentralisation of policies and the concept of subsidiaries takes on an increasingly important role, has given important results.

However, these practices must still become institutionalised throughout Europe, establishing specific procedural and administrative guidelines and rules able to allow for *pilot actions* or *experimentations* to become practice in all the funds. Despite the undeniable evolution, various obstacles still remain in the creation and programming of policies, as well as in their actual implementation. **Defining a system able to follow the programming and implementation process within a gender perspective requires, as a matter of fact, a specific political stance**, as well as greater awareness and ability within the administrative culture to take into consideration the different phases of the policy cycle, each one independent but at the same time closely linked with the others in a process of mutual influence.

In this respect, the contribution of evaluation is paramount. Following a bottom-up perspective (i.e. from the analysis of the results, back to the initial planning of the policy), there is a deep interaction between the phases of the policy process and the activities of the evaluation process. This interaction is indeed useful to ascertain how far the results have met the goals set in the planning phase and to highlight potential critical or positive aspects of the policy process. In this respect, evaluation can contribute to restate the original policy, bearing in mind the specific features of the local context and of the local implementation process, in order to maximise its efficiency and effectiveness.

Each phase of the policy cycle may be evaluated independently in order to identify the critical areas and/or the improvement areas not only of each single step of the policy cycle, but also of the overall policy in question. Within this analytical framework, evaluating the Structural Funds programmes in a gender perspective means:

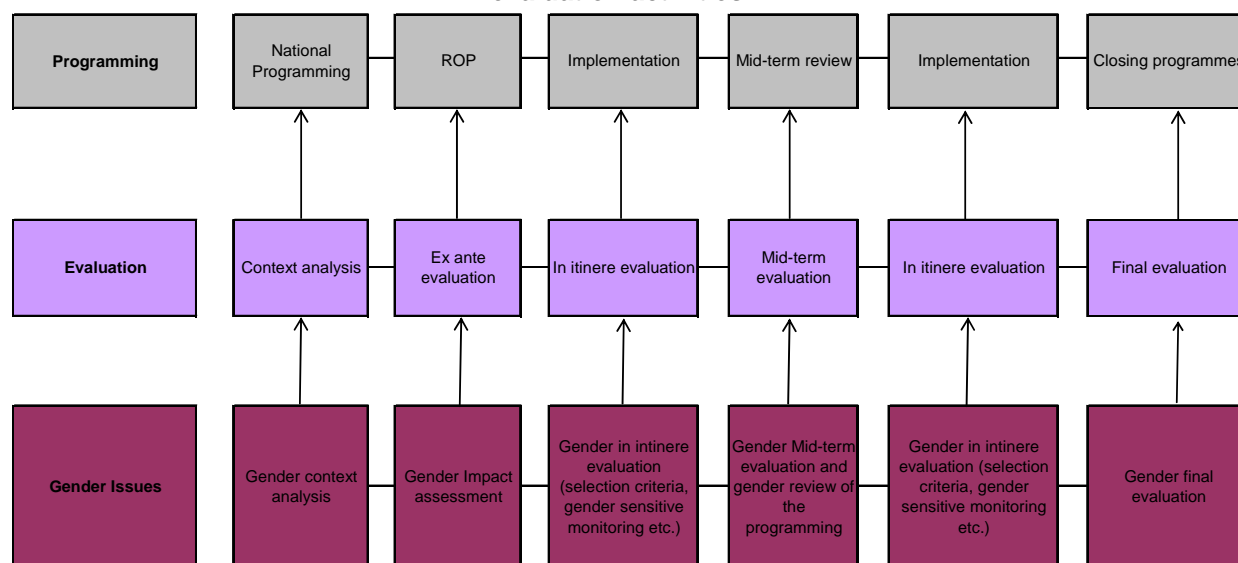
- to establish the conditions under which it can be stated whether or not each action implemented in a programme has potential gender implications. In these respects, a policy is considered to be gender relevant if it shows differences in women's and men's access, needs and outcomes of the policy itself;
- to explore the gender relevance of the programme - taking into account each phase of the policy process in the specific local context - and ensure the integration of equal opportunity priorities across all the phases of the programme evaluation.

In Chart 7, the different phases of the policy cycle are presented in relation to the different evaluation steps of the Structural Funds.

In order to understand how outputs and results of a policy or programme are produced, it is important to evaluate with attention everything that takes place between planning a policy and producing the result, i.e. the implementation phase, taking into account the different actors that intervene, whether directly or indirectly, their interactive mechanisms and the different

entity of the gains responsible for establishing that the *real* action is not what is decided, but what is actually carried out.

Chart 7. The Structural Funds Programming phases (2000-2006) and the gender-related evaluation activities



Source: Authors

According to this approach, the following pages present the main activities implemented in the 2000-2006 programming period for each step of the policy cycle by presenting significant examples, in order to assess what has worked, what has not and the lessons learned.

Gender mainstreaming in context analysis

The analysis applied to the OPs Objective 1 and Objective 2 that have been examined (see paragraph 2.1) was aimed at assessing if the context analysis was taking into account the gender dimension through the diagnosis of *gender-specific and gender-relevant issues*.

Gender specific and gender relevant

The distinction between gender-specific and gender-relevant issues is particularly crucial when analysing Objective 1 and Objective 2 programmes. It relates to the distinction between direct and indirect policies previously underlined. *Gender-specific issues* are all those issues that directly concern women (for example, the presence of women in the labour market) while *gender-relevant issues* are all those that, apparently, do not seem to have 'anything to do' with women but that, in an indirect way, may affect them. We refer, in this case, to all those elements that can contribute, for example, to a better quality of life for all citizens (both women and men) and of the socio-economic development of the territory. In connection to that, the analysis was also aimed at verifying and assessing if specific indicators were considered:

- *gender-relevant indicators*, i.e. indicators that can be specifically defined in terms of gender;
- *gender-sensitive indicators*, i.e. indicators that cannot be defined in terms of gender but contain significant information regarding the position of women in the reference context.

At a general level, the results of the analysis show that:

- 1) most of the OPs, when describing and analysing the context, take into consideration gender-specific issues and gender-sensitive indicators especially connected to the labour market such as, for example, activity rates by gender, unemployment rates and long term unemployment by gender; employment rates by gender, gender horizontal segregation (representation in different industries), vertical segregation (different level in the same industry), contractual segregation (part-time working), gender pay gaps, self-employed women, the proportion of women among new entrepreneurs.

This is particularly true for Objective 1 OPs that contain measures financed by the ESF which, usually, includes specific and direct measures/axis dedicated to women.

- 2) Even if considered, gender-specific issues and gender-sensitive indicators related to training and education are less utilised and, when present, are usually connected to labour market issues; educational levels are only used in relation to labour market indicators, such as, for example activity rates by gender and level of education.

What seems to be missed is a more extensive insight of the relation of women's position in society and in the labour market with educational attainment, a key issue to support women's activity. The breakdown by level of education could be used to describe and diagnose all gender-sensitive issues.

- 3) In some cases, especially in the Northern European Countries, there are some references to elements that may contrast or, at least, not support work-family life balance such as lack of childcare, lack of elder care support, lack of provision of support and welfare services, demographic structure of population.

Very few (for example Wales OP Objective 1) are the references to other issues more specifically connected to ERDF priorities such as, for example, transport infrastructure and services not related to childcare or elderly care provisions.

This is to say that the diagnosis of gender-relevant issues and, therefore, the use of gender-relevant indicators, are not usually envisaged.

- 4) Very few are also the references to women participation in political life, such as, for example gender balance in decision making and poor representation of female decision-making bodies.
- 5) Finally, most of the OPs (both in Objective 1 and Objective 2) do not include gender issues and indicators within the overall socio-economic analysis but present them in separate attachments. This is, again, another element that underlines the difficulty of really mainstreaming gender within all policies and aspects considered.

The assessment allows to state what has worked and what has not with reference to context analysis:

European indications related to the importance of identifying gender-specific issues have, at a general level, worked. This is particularly true in connection to the analysis of the labour market, while it presents some weaknesses in relation to other sectors of interest and reflects the European approach to gender equality. While efforts have been made, at European level, to internalise a gender perspective within the European Employment Strategy and

within priorities and measures financed by the ESF, this cannot be said for priorities and measures financed by the ERDF or other Structural Funds. The same is happening for the next Cohesion Policy programming period 2007-2013;

European indications related to the internalisation of gender perspective in all policies have, therefore, not been completely applied.

Some lessons that may be derived for the programming period 2007-2013:

- 1) There is still the need to internalise the gender dimension in the context analysis and, especially, to mainstream it in those sectors/issues that are not immediately related to women. A gender mainstreaming approach to context analysis should take into consideration and adapt to gender dimension each aspect that is important in describing and analysing a territory.
- 2) There is still the need to highlight problems/needs and opportunities, considering both women and men through the identification of tools that help the detailed analysis of the socio-economic context with a gender perspective (for example gender-oriented SWOT analysis).
- 3) There is still the need to identify/verify the potential impact of gender interventions. This can be done, for example, by determining the initial position of individuals in a certain context (at cultural, social, political and economical level) by gender with respect to the dimensions by which gender inequality can be assessed such as:
 - a) **participation:** disaggregation (by gender and within gender) of the target group of each policy, measure or intervention to translate apparently gender-neutral policy targets (for example the low-waged) into target groups that are clearly identified by gender while at the same time accounting for potential impacts on different categories of beneficiaries;
 - b) **resources:** identification of differences (by gender and within gender) in the distribution of resources such as income, time, space, information, political and economic power, qualifications, transport, use of public services;
 - c) **norms and values:** identification of norms and values which influence gender roles and the gender division of labour, the attitudes and behaviour of women and men;
 - d) **rights:** identification of direct or indirect gender discrimination in any field of social, civil and economic life.

The initial situation prior to the implementation of policy needs to be considered from a dynamic and not solely a static perspective, assessing the past and future trends in male and female positions in order to understand the future context for policy and to identify which tools are more likely to achieve the desired performance. Future risks and past trends must be taken into account, as well as any contradictory trends in gender gaps that may be operating.

This initial assessment should identify the intensity of the gender equality gap and thereby feed into determining the priority to be attached to gender equality in the formulation, the monitoring and development of the policy measures.

Gender mainstreaming and transport infrastructures: a toolkit for Structural Funds programming

Transport policy-makers and practitioners should deal with the differences in the way women and men travel and in the patterns and transport use. Gender key issues which have been highlighted include:

- **Gender differentiated access to private transport** (i.e. fewer women drive and own cars, and are therefore more likely to rely on public transport. This underlines the need for public transport and also of a range of issues from design of buses, trains and roads, security, lighting, provision of information, access, routing, location of stops, ticketing, request stops, pedestrian safety).
- **Patterns of commuting and employment and child-care and other dependent care responsibilities.** Women make multiple trips on public transport facilities, bringing children to school or care, shopping, visiting elderly or sick relatives. For men, the main commute is to the workplace.

A range of processes should be scrutinised to support a gender mainstreaming in the programming of transport policies, specifically:

- **Programme governance and decision-making structures:** mainstreaming requires that those involved in the process of managing and implementing programmes and policies know how to apply gender equality.
- **Needs analysis and data collection.** The identification of patterns of gender inequality to introduce gender sensitivity into policies and to monitor the gender differentiated impact of programmes requires gender differentiated data and information with regard to a number of variables.
- **Communication and consultation.** Policy targeting is crucial for gender mainstreaming: building wider consultation and better communication, both in management and implementation are strategic tools to the purpose.
- **Measurement and reporting practices.** The requirement to provide quantified objectives and monitoring indicators concerning gender again calls for appropriate data and information to implement a responsive monitoring system.

As for specific examples of areas of gender sensitiveness in the transport policies to be considered: safety / comfort; accessibility; routes / services provided; costs, information provided

Source: *Gender Equality and Transport. Fact sheet for the economic and social infrastructure operational programme of the national development plan, 2000 to 2006*, European Policies Research Centre of the University of Strathclyde, August 2001

Example of gender mainstreaming under ERDF – North East of England - Objective 2 –: assessing equal opportunities and gender mainstreaming in the context diagnosis

The Equal Opportunities analysis conducted in this Programme is very detailed and informative. It combines analysis of existing data with a desk review of research studies on different issues. The profile addresses the five main target groups under the region's interpretation of the horizontal theme: gender; ethnic minorities; disability; lone parents; and age (above 50 and under 25). Other groups are briefly covered where there is some data (e.g. asylum seekers and refugee groups). For most groups, data limitations have restricted what kind of analysis can be conducted. For the most part, the profile concentrates on the relatively low levels of economic activity of the groups, drawing on information within the UK Labour Force Survey, in terms of: unemployment; employment; occupation (as a proxy for job quality); and skills and qualifications. In addition, the analysis considers the aspirations of these groups and the impediments to those aspirations, placing the low levels of activity within context. Not surprisingly, the analysis by gender is more detailed, adding welfare dependency (in receipt of benefits), part-time employment, home-working, earnings levels (for full-time employment by sector and occupation), self employment and the gender composition of employment by sector.

The gender diagnosis of territorial needs has supported also the implementation phase of the Programme supporting the carrying out of best practices.

Source: Sandra Taylor, Laura Polverari and Philip Raines, *Mainstreaming the Horizontal Themes into Structural Fund Programming*, IQ-Net Thematic Paper 10(2), 2001, and www.europeanfundingne.co.uk/news/casestudy.cfm?cs=5&ct=5

Gender mainstreaming in strategy definition and design

As far as the general objectives and design of the strategy are concerned, the analysis applied to the OPs Objective 1 and Objective 2 was aimed at verifying and assessing if:

- the general design and the general objectives of the strategy envisaged gender sensitive or gender-relevant objectives;
- women have been explicitly considered as target population;
- the announced objectives take into account the interests and specific needs of women, as well the potential impact on equal opportunities;

At a general level, the results of the analysis show that:

- 1) All the OPs, both in the case of Objective 1 and Objective 2, take into consideration the principle of equal opportunities which is, at least formally, always quoted within the design of the general strategy of the programmes. Promoting and ensuring equal opportunities is usually a value of the programmes and the commitment to ensure equality of opportunity in its implementation and delivery is, in most cases, ensured. Where appropriate, throughout the Priorities and measures of the programmes, activities are specifically targeted to tackle the barriers to economic inclusion faced by specific target groups (black and minority ethnic groups, women and the disabled).
- 2) To achieve such integration, account has been taken of the principle of gender mainstreaming ensuring that equality considerations are built into all policy development, implementation and appraisal systems and processes. This approach is usually declared to be adopted at all stages during implementation and management. In some cases, the general strategy envisages a specific Mainstreaming Strategy.

An example of specific Mainstreaming Strategy – the London OP Objective 2

The London OP Objective 2 has produced a Mainstreaming Action Plan for Equal Opportunities approved by the London European Programmes Committee to tackle discrimination against women, disabled people and black and ethnic minorities and to remove barriers that prevent them from participating or being successful in the programme. The aims and objectives of the Mainstreaming Action Plan are: (i) to remove barriers to European Structural Funds for women, ethnic minorities and disabled people; (ii) to get measurable benefits for women, ethnic minorities and disabled people as a direct result of European Structural Funds; (iii) to make sure European Structural Funds are managed by organisations and committees that represent the diversity of London's communities.

Source: London ROP

- 3) There is a difference between Northern and Southern European countries with reference to what has to be considered to achieve equal opportunities. For Northern Countries the principle has not an exclusive gender connotation and equal opportunities are considered in a wider meaning (gender, ethnics, disability and so on); for Southern Countries, usually, equal opportunities have a gender connotation. This different approach is strictly connected, of course, with the definition of general objectives as well as specific target groups.
- 4) In many cases, specific equal opportunities Objectives are identified even if, mostly, related to labour market issues or, at least, to issues concerning education and training. For example:

- increase and secure access to education, training and employment opportunities for specific targets (including women) who suffer from exclusion and increase the number of women securing training and employment in higher paid and higher skilled sectors and self employment;
 - increase the number of employers and training organisations adopting equal opportunity policies and working practices to reconcile work and family life issues together with support activities that increase the adoption of equal opportunities strategies and family friendly policies and / or the awareness of the benefits of equal opportunities;
 - increase the diversity of social and economic partners participating in the management and implementation of the programme, also ensuring more even representation of women, ethnic minorities, people with disabilities and other excluded groups in higher income and higher skill occupations;
 - increase the number of successful businesses owned by women, ethnic minorities, people with disabilities and other excluded groups.
- 5) With relation to positive action for women, measures have been designed to address gender-specific obstacles to equal access and participation, aiming to neutralize discriminatory effects in all priorities such as measures to:
- support an overall increase in the employment rates (part-time and full-time) also through the support of entrepreneurial activities among women;
 - improve women's career progression and access to higher level positions;
 - address imbalances in the representation of women or men in certain economic sectors or occupations and ensure greater balance in decision making structures.
- 6) Particularly in relation to the Objective 2 programmes, policy fields relating to equal opportunities for all and to social inclusion are integrated by:
- promoting the development of confidence, hope and self-empowerment in underprivileged communities;
 - bringing local communities and individuals forward to the point where they take greater charge of their opportunities, needs and aspirations also through the support to voluntary sector activity in local capacity building;
 - providing training and support for community business, including co-operatives, tenants associations, credit unions, community groups where they are specifically involved in community development.
- 7) Again, particularly in relation to the Objective 2 Programmes, policy fields relating to equal opportunities are considered in connection to the local economy with some references to infrastructures. For example:
- Develop and deliver vocational training courses that take into account different needs of different client groups e.g. language, times, dependant care, access, distance learning and use of ICT.

- Encourage grant recipients to ensure that companies with whom contracts are placed have a positive approach to equality of opportunity.
 - Use of tutors/ mentors from the same community, e.g. women, minorities, ethnic communities.
 - Undertake more detailed research into key sectors of employment and customise training/business support/provision for those sectors
 - Improve access to finance/risk capital for under-represented groups e.g. by offering smaller loans, promoting availability of loans in community language and by using positive images
 - Promote business support services in community languages, font sizes in different formats and by using positive images that reflect the diversity of the region
 - Deliver services at flexible times, accessible locations, and via ICT
 - Encourage the provision of dependant care in conjunction with training, work based placements and in companies.
 - Use ICT to create a more flexible working environment or to allow distance learning from home or tele-working
 - Ensure that all buildings and infrastructures supported by the programme are accessible to all under-represented groups.
 - Improve women's access to ICT jobs and leading positions in firms, particularly SMEs
- 8) Attention is paid, in some cases, also to the objective related to gender governance through, for example:
- the possibility to set achievable targets in relation to gender balance on all partnership groups and Programme Committees;
 - providing periodical equalities statement on the progress of the programme;
 - encouraging all partnerships to include an equal opportunities profile within their strategies/packages.
 - establishing working groups to oversee the implementation of the equal opportunities strategy.
- 9) When women are explicitly considered as target population, headline targets (indicators) are identified such as, for example, target % in jobs created to be secured by women; in SMEs assisted starts up; in higher-level training places, in female participation rates, etc.
- 10) However, very few OPs (Italian and Irish Objective 1 OPs for example) have introduced specific tools to verify the potential impact of the Program on women and men. Gender

Impact Assessment (GIA⁽²⁸⁾), for example, could be applied in order to estimate the different effects (positive, negative or neutral) of any planned policy or activity in terms of gender equality. GIA general purposes are, indeed to (i) help identify intervention strategies that take into account gender equality; (ii) verify planning quality in terms of gender equal opportunities; (iii) verify the requirements, with regard to gender equal opportunities, that are intended to be met in planning (a policy, a programme, an activity) and therefore what are the priorities and the issues on which planning choices should have founded on; (iv) contribute to the overall policy evaluation according to gender mainstreaming principle.

An example of attention to identify alternative policies: Procedure for the conduct of Gender Impact Assessment in Northern Ireland

In the *Guide of Statutory Duties for Northern Ireland*, the Equality Commission defines specific elements to be required for equality impact assessment.

Particular attention is given to the consideration of measures to mitigate any adverse impact and to policies that might better achieve the promotion of equality of opportunity. The consideration of mitigation and alternatives is identified as a crucial element of the process: managing authorities must develop options that reflect the different ways of delivering a policy outcome.

Mitigation can take the form of lessening the severity of an impact. Consideration must be given to whether separate implementation strategies are necessary to increase the policy effectiveness for each relevant group. Options should be assessed on:

- how they increase or hinder equality of opportunity;
- reinforce or challenge stereotypes;
- the consequences for the group concerned and for the public authority of not adopting an option more favourable to equality of opportunity;
- the costs of implementing each option;
- whether international obligations would be breached by, or could be furthered by each of the options.

The realistic consideration of the impacts of reasonable alternatives must be evident in any final recommendation to policy makers.

To summarise what has worked and what has not with reference to general objectives and design of the strategy:

- The European commitment regarding the introduction of gender mainstreaming principle has, at a general level, worked. Both Objective 1 and 2 programmes confirm the commitment to embrace equal opportunities in terms of both the principles set down in the Treaty of Amsterdam (European Council, 1997) and of promoting equal access to all groups irrespective of gender, race, ethnic origin, disability or geographical location.
- European indications for the presence of specific objectives related to women have also worked even if, there is the predominance of objectives connected to policy fields and priorities related more to the ESF than to ERDF and Cohesion Funds.

The main lessons that can be derived for the programming period 2007-2013 are the following:

- 1) Efforts are still to be made in relation to the identification of specific objectives and strategies to be applied in ERDF policy fields and priorities.

⁽²⁸⁾ Examining policy proposals to see if they will affect women and men differently, with a view to adapting these proposals to make sure that discriminatory effects are neutralised and that gender equality is promoted.

- 2) The link between gender and local development should be more emphasised within global objectives and strategies.
- 3) As we have seen, GIA is in its early stages in most countries and it is used at an uneven rate across the Member States, including those countries where the political commitment to gender equality has been established for many years. Introducing a gender perspective in the planning phase of each programme or plan should not be a secondary element. On the contrary, assessing the potential impact of any policies or activities on women and men is necessary and useful in making programmes and/or plans concrete and operational and in making gender priorities and objectives more evident.
- 4) GIA should be carried out at an early stage in the policy decision-making process (before the approval and implementation of a programme), so that the policies could be adapted or reoriented. This is especially true in case of neutral or negative effects, helping the decision-makers to choose between: (i) alternative scenarios (derived from differing estimates of the gender outcomes of the actions to be launched); (ii) alternative programmes and projects; (iii) alternative methodologies for carrying out the same programme or project.
- 5) The assessment of the current degree of inequality and of future trends (see Context analysis) helps to determine which priorities should be considered to actively promote gender equality and increase the positive impact on women and men.

Example of gender mainstreaming financed under ERDF – North West England - Objective 2: assessing equal opportunities and gender mainstreaming in the context diagnosis and in the overall strategy

The North West England Objective 2 programme presents a detailed and comprehensive strategy for gender mainstreaming as a cross-cutting theme (CCT). Specific equal opportunity targets have been developed for the three vertical priorities, focusing on numbers of jobs created and safeguarded, new companies and SMEs assisted, and the securing of positive outcomes in terms of learning, employment, self-employment and micro-business creation. The Equal Opportunity Strategy involves three mechanisms: scoring and appraisal criteria for projects, the creation of an Equal Opportunities Advisory Group, support and guidance for project sponsors.

To support this general strategy, the gender analysis of the context considers the labour market dynamics in relation not only to employment and unemployment, but also gender pay gaps.

In the evaluation of the implementation of the programme with reference to the CCTs (ECOTEC, 2006), it is pointed out that the good basis provided by a gender sensitive programming might anyway encounter implementation obstacles.

Indeed, according to the evaluator, ERDF projects have had some problems in enabling private sector companies and SMEs to adequately address equal opportunities, especially in relation to monitoring activities.

In addition, there is little evidence to show that: issues such as reduction in the pay gap have been achieved. The implementation of equality policy should on the other hand produce tangible improvements in the profile of organisational staffing and closure of key areas of inequality.

The evaluator underlines that it has been hard for the private sector to justify the additional costs, or recognise the business benefits of an equality approach to their work. Rather, it was worth a 'cultural impact' enabling employers to recognise the link between filling skills gaps and the value of a diverse workforce.

The evaluator also concludes that the uneven nature of the legislative position for public and private sector companies in the UK leads to problems in relation to the requirements for projects in terms of equal opportunities. A stronger efficacy might be promoted identifying the significance of equality principles for business.

Source: Ecotec (2006)

Gender mainstreaming in specific objectives and design of measures

The analysis of specific objectives and design of measures was aimed at verifying and assessing if:

- gender-sensitive or gender-relevant objectives are considered;
- women are explicitly considered as target population of specific objectives and measures;
- the announced objectives take into account the interests and specific needs of women as well the potential impact on equal opportunities.

At a general level, the results of the analysis show that:

- 1) There are two different approaches which reflect the initial country conditions in relation to equal opportunities: one that strictly follows the gender mainstreaming principle (Anglo-Saxon and Northern Countries), and one that follows the dual approach combining gender mainstreaming with positive actions - dedicated measures within the programme (Continental and Southern Countries like France, Belgium, Spain, Italy).
- 2) The second group of countries (Continental and Southern Countries) present positive actions and dedicated measures mostly in Objective 1 programmes, while in the Objective 2 programmes the mainstreaming approach is followed even if not with relevant results.
- 3) When the gender mainstreaming approach is followed, actions to achieve the equal opportunities priority objectives are implemented through all programme priorities/measures such as, for example, those presented in table 8, which summarises the most significant types of intervention by policy field.
- 4) Specific objectives and measures, positive actions and projects specifically directed to women are mostly designed in relation to employment and training opportunities, promotion of women's entrepreneurship, participation to local development, women-friendly services and work and life balance, territorial networks of services for people and social community. Specific objectives and measures dedicated to the gender issues are, for example, those indicated in table 9.
- 5) GIA is widely used to assess potential impact of both dedicated and not dedicated measures.

Table 8. Gender-oriented interventions and policy fields

Policy Field	Gender oriented interventions
Enterprise and Innovation	<ul style="list-style-type: none"> ▪ increase the numbers of women and other excluded groups in self employment or in businesses creation; ▪ encourage representation and participation of under-represented groups, such as women and young people within the small business sector; ▪ encourage access to the funds for business start up, of groups not highly represented in the SME community (for example women owner-managers and young people); ▪ promotion of Information Society, which can favour new labour opportunities for all, above all for women; ▪ promotion of economic and technological systems, with special attention to the promotion of women's entrepreneurship
Strategic Development Opportunities	<ul style="list-style-type: none"> ▪ promote gender balance in training and related activities at all levels and sectors; ▪ increase the numbers of disadvantaged groups participating in training and lifelong learning; ▪ improvement of women in the labour market; ▪ enlarge female activities in the tourism sector; ▪ support to the Social Economy, in order to promote community and care services, which can improve women's employment and work and life balance.
Sustainable Communities	<ul style="list-style-type: none"> ▪ ensuring that childcare strategies are developed and implemented ▪ small grant funds, like community chests, that will fund community organisations and others to participate in regeneration activity - including pilot childcare, environmental, equalities, community business development and community transport projects; ▪ making buildings and transport links more environmentally and family friendly and safe and accessible for local people including disabled people, families, women and faith communities.
Development of rural area:	<ul style="list-style-type: none"> ▪ creation of complementary replacement services allowing for the farmers and their partners (women) as well as the family aides to be replaced temporarily while engaged in formation or associative activities in the community; ▪ enhance services in order to facilitate the life of women in rural areas.
Development of fishing and aquaculture production	<ul style="list-style-type: none"> ▪ upstream and downstream activities (feed production, fish processing and packaging) provide employment opportunities near home for women living in coastal communities; ▪ provide job opportunities for women by investment in fishery harbours, aquaculture and onshore facilities; ▪ improve access to education, training and employment opportunities for island dwellers and open up opportunities for tourism revenue from island visitors, both of which will benefit women.

Table 9. Examples of Positive actions in the Regional OPs

Positive actions	<ul style="list-style-type: none"> ▪ raising the awareness of gender equality among the public actors; ▪ to support and enhance women business activities in fields such as tourism, services, social actions etc; ▪ for the reconciliation between family and professional life; ▪ for women on the labour market; ▪ to develop a culture and praxis of equality between men and women in order to contribute to sustainable development of the region its inhabitants; ▪ to support and enhance the creation of enterprises by women; ▪ reinforcing women role and status within the agricultural sector; ▪ for the (re)integration of women into the labour market; ▪ to support to women to increase qualification, build up self employment ▪ for mentoring programmes to coach women ▪ for unemployed women
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Source: Grids for Structural Funds OPs assessment (see Annex III)

To conclude:

European commitment for the introduction of gender mainstreaming has, at a general level, worked. Both Objective 1 and 2 programmes confirm the commitment to equal opportunities in terms of both the principles set down in the Treaty of Amsterdam and in terms of promoting equal access to all groups irrespective of gender, race, ethnic origin, disability or geographical location.

European indications regarding the introduction of dual approach principle has not always worked. In the Anglo-Saxon and Northern Countries there is a lack of dedicated measures and positive actions that could reinforce the gender mainstreaming principle.

Some lessons can be derived for the programming period 2007-2013:

where pre-requisites exist for the introduction of programmes/development interventions of specific actions, it is advisable to identify priority areas/objectives. Direct actions could easily be aimed at those areas related to ESF Policy fields;

there is still need to develop proposals relating to other specific issues more connected to ERDF Policy Fields such as gender and innovation policies; gender and infrastructures (not only social ones, but also transport, for example) and gender and local development.

Example of gender mainstreaming financed under ERDF – East Finland Objective 1 – Action Line 4 – Measure 4.4 - Developing the structures of everyday life

The aim of the measure is to develop innovative services and activities for the benefit by different social groups. As assessed in existing analysis (Engender abs1, 2002) of the programming documents, Measure 4.4 (Developing the structures of everyday life) under Action Line 4 of the OP Objective 1 of East Finland has gender (mainstreaming) relevance due to the declared goals of promoting equal use of new information technologies in everyday life, developing new interactions between different groups of people and between working life and leisure time.

Supported actions in Measure 4.4, all having mainstreaming contents, include:

- developing new service structures benefiting from opportunities offered by Non Governmental Organisations (NGOs) and IT;
- development of IT which support welfare services;
- testing welfare services that improve labour market participation;
- improving living conditions;
- developing new ways of participation
- promoting children's and young people's well-being
- improving interactions between different social groups and establishing meeting places
- entrepreneurship Centres
- integrating IT in everyday activities and promoting tele-work.

According to the OP expected impacts of the measure in terms of equal opportunities and gender mainstreaming are:

- the creation of new jobs for women in the service sector;
- enhancement of women's interest in IT and improvement of market demand of women's traditional skills in IT-Sector;
- promotion of new kind of entrepreneurship in traditional low-wage jobs in the service sector.

Source: Engender abs1 (2002), *Integration on Equal Opportunities between women and men in Objective 1 Structural Funds Programming documents*, Final Report

Gender mainstreaming and resources allocation

The analysis concerning resources allocation aimed at verifying and assessing: if the gender dimension is considered in allocating resources and if there are any budget thresholds devoted or connected to equal opportunities and/or gender mainstreaming objectives.

The results of the analysis show that:

- 1) When gender equal opportunity is considered as a horizontal issue (equal opportunities have to be implemented through different priorities and measures), it does not have an allocated budget and it is quite difficult to estimate, even if only approximately, the actual share of resources devoted to gender mainstreaming;
- 2) In some OPs (for example, Northern Ireland Objective 1, West Wales and the Valleys Objective 1 and North West of England Objective 2) even if there is no threshold in the budget dedicated to gender equality, specific equal opportunities targets are set, such as, for example % of ESF financial support explicitly directed towards childcare issues; % of financial support explicitly directed on lone parents or targeted at specific groups of women; % of funds to be spent on part-timers.
- 3) When equal opportunities issues are present in some dedicated measures, it is, of course, easy to assess the overall amount and the percentage on the entire Program resources;
- 4) Apart from Italian Objective 1 programmes, no one else has stated a fixed allocation of resources to equal opportunities dedicated measures. In Italy the resources allocation devotes 10% of the total amount of ESF within the entire programme.

The main lessons for the programming period 2007-2013 are the following:

- 1) The provision of a financial reserve for equal opportunity activities within each fund should be considered with additional support for cross programmes and other initiatives being funded separately under technical assistance. In this way direct actions (institutional activities and technical assistance) and indirect actions (gender mainstreaming) could be effectively combined in order to obtain results which are concrete, measurable, transferable and reproducible;
- 2) The use of specific tools and methodologies, such as gender budgeting aimed at verifying and assessing the real amount of financial resources dedicated to gender mainstreaming within the programmes, should be widespread and supported.

Gender mainstreaming and procedures for the selection of projects

The analysis is aimed at verifying and assessing if: the procedures envisaged for the selection of the projects (i.e. selection criteria) explicitly consider the gender dimension (i.e. target population), and the criteria explicitly consider gender issues (i.e. gender mainstreaming objectives of the projects).

At a general level, the results of the analysis show that the use of projects' selection procedures that take into account the gender dimension are widespread and different are the solutions provided by different Countries:

- 1) In all the OPs analysed there is the formal declaration that all the projects submitted (even those not specifically directed to women) have to comply with the principle of equality of opportunities between men and women;
- 2) In many cases (especially in the Anglo-Saxon countries) gender elements are present in the so called *gateway criteria* in order that a project's content, focus or direction is consistent with the objectives of the equal opportunity priority. The gateway criteria can take into account, for example (i) the extent to which project sponsors made arrangements for training and awareness raising of project staff in equal opportunities; (ii) the extent to which project sponsors have taken into consideration gender equality issues in the design of new facilities, such as personal safety, access to childcare, proximity to public transport routes; (iii) the extent to which appropriate gender-related targets have been set and appropriate monitoring arrangements proposed;
- 3) In addition, most of the OPs declare that projects will be assessed by specific criteria against the cross cutting themes and, usually, equal opportunities is one of them. In this case, also projects and interventions which are not specifically oriented towards the improvements of equal opportunities can be examined in relation to their consideration of equal opportunities such as, for example:
 - In designing and developing the project, have the needs of the target groups been addressed?
 - Will all clients/beneficiaries receive advice/guidance/training on equal opportunities legislation/issues as part of the project?
 - Will the project be delivered at flexible times/locations?
 - Does the project promote family-friendly policies?
 - How will the project ensure that all target groups have equality of access to training opportunities?
 - How has the project addressed the needs of the target groups in providing business support advice?
- 4) In some OPs, especially those in which specific measures directly aimed at women are considered, a proportion of the total score is earmarked for an assessment of a project's contribution to the equal opportunity priority.

Criteria for assessment of the contribution to the Equal Opportunity Priority

The criteria take into account, for example how the project: encourages women to participate in business start-ups and in the creation of new technology businesses; encourages companies to adopt Equal Opportunities Action Plans; supports female-owned businesses to increase turnover, profitability and sustainability/ survival rates; encourages women to participate in business networks and clusters; supports access for women to employment opportunities; supports women access to training and development opportunities; provides support for beneficiaries with child/ dependent care; supports the participation of women in management and the control of projects and partnerships (e.g. capacity building initiatives, good practice networks, etc); encourages women to take up ICT opportunities.

- 5) In some other cases, additional weighting in the selection criteria are considered for projects which involve a high proportion of targeted group beneficiaries (also women). Especially in the Continental and Southern Countries (France, Spain and Italy) additional scores are given to those projects that actively contribute to the equality of opportunities between men and women. This prioritisation is particularly aimed at enhancing women's participation in the labour market and in training opportunities.

In conclusion, at least in a formal way, all the OPs consider equal rights and opportunities for men and women as a central horizontal principle, which is usually applied in the definition of selection criteria of all projects.

The main lessons to be derived for the programming period 2007-2013 are:

- 1) ERDF and EAGGF measures are less gender-oriented from an operational point of view. This means that there is a need to identify more specific and tailor-made selection criteria concerning policy fields that are not financed by ESF;
- 2) The use of targeted selection criteria should be reinforced as a way to contribute to the improvement of the quality and quantity of gender equality interventions, with evaluation marks awarded specifically to measure the level of gender inclusion in the project proposals. These would help reaching predefined objectives which could be evaluated through gender auditing procedures.
- 3) The introduction of gender issues and gender-specific criteria within 'gateway criteria' should be increased.

Example of gender mainstreaming financed under Objective 1 – PUGLIA – Objective 1 OP: gender selection criteria

The OP Objective 1 of Apulia (Italy) comprises a significant number of measures (about 30 out of 55) describing envisaged procedures for the selection of projects and indicators that are connected with equal opportunities and gender mainstreaming. The most frequent and specific gender selection criteria are:

- projects having female beneficiaries benefit additional evaluation points;
- female occupation in firms beneficiaries of the interventions give additional evaluation points.

Less specific gender selection criteria are also envisaged, such as the generic consideration of the transversal priorities, among which equal opportunities

Under Apulia OP up to the end of 2004, also the implementing phase shows a minor effort to give operational contents to the gender-sensitive envisaged procedures. Nevertheless, with special reference to those apparently more gender-neutral Funds, such as FIG, gender selection criteria were introduced. For example, the resources under measure 4.13.B – (Support to competitiveness and innovation in fishery) are granted also considering, as a selection criterion, the support to women in the generation of socio-economic activities.

Source: Department for Equal Opportunities, *Aggiornamento dell'analisi dei bandi relativi all'attuazione dei programmi operativi regionali e nazionali dell'Obiettivo 1.* – Luglio-dicembre/2004, December 2005.

Gender mainstreaming and monitoring and evaluation of the programme

The analysis intended to verify and assess if and how the programmes monitoring and evaluation systems have considered the implementation/results/impacts from a gender perspective (i.e., the collection of gender differentiated data, the definition of gender-relevant and gender-specific indicators, ad hoc methodologies to monitor and evaluate gender impacts etc.).

At a general level, the results of the analysis show that:

- 1) As far as monitoring and evaluation indicators are concerned:
 - Most of the Operational Programs examined declare formally that all the targets and indicators drawn up for single priorities and measures will also include data broken down by gender in order to assess how well programmes are achieving the gender equality objective. However very few are the Operational Programs that have designed gender-relevant indicators.
 - Gender-sensitive indicators are envisaged in connection to dedicated measures specifically targeting women. For example: number of businesses adopting equal opportunities strategies/new flexible work practices; number of beneficiaries supported with childcare costs. More widespread are gender-relevant indicators, such as: percentage of women employed with temporary contracts; number of female applicants for the measure; number of allocations to female applicants; number of enterprises created by women; percentage of women managers/ managers; percentage of women at decision-making level; percentage of women entrepreneurs/entrepreneurs.
- 2) As far as programme evaluation is concerned:
 - few OPs ensure that evaluations consider the extent to which the principle of promoting equal opportunities has been taken into account in the implementation of the programme.
 - very few OPs develop adequate and specific evaluation procedures, tools and indicators to this end;
 - only in the case of ESF programmes, the annual and final implementation reports have the commitment to contain a specific chapter describing the actions taken to ensure the implementation of the equal opportunities objectives of the programme, and to which extent the targets set out in the programme have been met.

An example of an evaluation method in use during the 2000-2006 programming period: Strategic Gender Impact Assessment of Equal Opportunities (VISPO) in Italy

In 1999 the Equal Opportunities Department defined a Gender Impact Assessment Model (VISPO) with the main purpose of helping national and local decision-making actors in planning Structural Funds OPs to adopt gender perspective. The model defines:

- a theoretical approach, which seeks not to limit equal opportunities interventions to specific measures directed only at women;
- a methodology and specific tools to measure, monitor and evaluate (criteria and indicators);
- priority fields with the goal of embedding the full complement of equal opportunities considerations in all programming, implementation and evaluation phases.

Within the more General Objective of enhancing equal opportunities and promoting equal participation of women and men, VISPO identifies four global objectives to be considered when planning measures and interventions within OPs:

- 1° Global Objective: Improving living conditions better addressing the needs of women;
- 2° Global Objective: Improving women's access to the labour market and vocational training;
- 3° Global Objective: Improving female working conditions (in terms of careers) and to promote the redistribution of caring;
- 4° Global Objective: Promotion of female participation in self-employment.

The model envisages:

- 1) The classification of planned measures in terms of potential impact (neutral, open to a gender equality perspective, characterised by a gender equality perspective) on gender equal opportunities.

Each measure receives a score (0 if neutral, 1 if open to a gender equality perspective, 2 if characterised by a gender equality perspective) in relation to each of the four Objectives identified by the model. The sum of these scores determines the global score of the measure.

2) The classification and description of envisaged effects through potential gender impacts related to each Objective and to the more General Objective of enhancing equal opportunities.

VISPO identifies also a set of gender sensitive monitoring and evaluation indicators that might be used to measure and compare potential and effective outcomes. This evaluation method has been applied with success on all the Structural Funds.

To sum up, European indications regarding equal opportunity as an element that should be considered during the monitoring and evaluation phases have not been significantly developed in the 2000 – 2006 programming period, outside the ESF programmes.

The lessons that can be used for the programming period 2007-2013 are the following:

- 1) Improve the availability of statistical information disaggregated by gender.
- 2) Enhance the design and implementation of specific sets of gender-sensitive and gender-relevant indicators also with reference to priorities and measures that are not financed by ESF. That is to say that the use of gender perspective evaluations should be available not only in interventions addressed to women, but also for other policies. The definition of gender-sensitive evaluation indicators is necessary to identify the essential data that will be useful for comparing potential and effective impacts of a programme.
- 3) Introduce gender evaluation not only for thematic evaluations, but also in all phases of evaluation process, by making gender evaluation compulsory, according to an agreed framework and re-defined evaluation stages.
- 4) A 'gender-sensitive' monitoring system should be supported to provide continuous feedback on the reaching of equality objectives and to encourage the good practices already in use.
- 5) Provide specific gender training to personnel engaged in the management of programmes and the selection/monitoring /evaluation of the projects/programmes.

Gender mainstreaming and managing organisation

The analysis aims at assessing if:

- authorities responsible for equal opportunities have been involved in the design of the strategy, the monitoring and evaluation systems, and selection criteria and in the selection of the projects;
- within the Managing Authorities, there is the presence of expertises on equal opportunities and gender mainstreaming issues;
- people responsible for programme management are aware of all the issues involved in promoting equal opportunities.

At a general level, the results of the analysis show that managing organisations have started to take into account the necessity of involving bodies that, at different levels, are responsible for equal opportunities, and experts on these issues; this consideration is valid both for Objective 1 and Objective 2 and for all the countries examined (with differences among countries).

- 1) In all cases, the prevalent role of these bodies/experts is only a ‘consultive’ one, that is to say they are expected to advise the Managing Authorities on integrating equal opportunities into Structural Fund programmes and to make recommendations on how equal opportunities should be implemented, including issues related to the appraisal and endorsement of projects and to advise on monitoring and evaluation methodologies.
- 2) On the contrary, the organisational assets are different. For example: representatives of equal opportunities issues within Managing Authorities; Equality Advice Groups, Equal Opportunities Focus Groups or Equal Opportunities Advisory Groups within Programme Monitoring Committees; Horizontal Managers dealing also on gender issues; External experts with extensive experience of equal opportunities; Institutional Bodies for Gender equal Opportunity such as Commissions for equality between women and men, regional *Women’s Boards*.

In conclusion, the European indications to consider equal opportunity within Managing Authority have been applied, but only at a formal level and with mainly consultative roles.

For the programming period 2007-2013:

- 1) There is still the need to reinforce the role of experts and bodies that deal with gender equality issues within Managing Authorities.
- 2) There is still the need to enhance appropriate co-ordination mechanisms in order to monitor gender inclusion within programmes, measures and projects. Moreover, another opportunity to be considered is that of enabling Managing Authorities to identify failures and set new objectives to address gender gaps.
- 3) Finally, information and communication are crucial elements to support the spreading of a different culture and sensitivity towards equal opportunities. Shortfalls in knowledge of gender issues are reported as high amongst both the politicians and officials who have an important role in planning policies. Information programme for

broadening the attention to a gender perspectives should be improved through the following mechanisms:

- consulting women's and men's groups or associations to identify main elements to be pursued by any communication strategy;
- planning the communication strategy by setting out what the policy will deliver for different groups of women and men;
- building relationships with others and conveying ideas and messages in ways that different groups of women and men can understand.
- producing key messages on what the policy will do for those it is aimed at and produce key messages for all other interest groups.

Example gender mainstreaming financed under Objective 1 – Italy – Regional OPs under Objective 1 -: technical assistance, gendered monitoring and evaluation practices and managing organisations and bodies

The Italian Department of Equal Opportunities (DEO) is the support structure which operates in the functional area relating to the promotion and coordination of equal opportunity policies and of Government actions aimed at preventing and removing discrimination. The Department sees to:

- obligations regarding the acquisition and organisation of information and the promotion and coordination of activities regarding knowledge, verification, control, training and information in relation to equality and equal opportunities;
- handling relations with interested local administrations and bodies that operate in Italy and abroad;
- adoption of the necessary initiatives to ensure Government representation in national and international bodies.

The Department of Equal Opportunities, therefore, places attention, in all the areas where policies and initiatives are established, on the adoption of a "gender dual approach" in order to assess their main differential impact for the sexes. As for the Structural Funds programming period 2000-2006, DEO has played a major role providing technical assistance to all Italian Regions under Objective 1 to promote the equal opportunity principle and the gender mainstreaming approach in all phases of the policy cycle.

- At *national level* the dual approach strategy has been promoted through the adoption of a general methodology, the VISPO Guidelines (1999) which, has offered support both for the definition of the Regional Programmes and in terms of the assessment approach in relation to all the stages of EU programming.

The support offered to Italian Regions under Objective 1 Programming resulted not only in a set of methods and practices for the gender assessment and implementation of OPs but also in new programming initiatives introduced in the Objective 1 Community Support Framework (CSF), following the mid term review.

Among DEO's activities, the support to Administrations involved in managing Structural Funds for the internalisation of the principles of equal opportunities and gender mainstreaming is strategic to direct, orient, identify and transfer good practices, as well as to collect and process data and statistical information, also ensure some territorial homogeneity and effectiveness. Special focus deserve the efforts made in strengthening *parity organisms and networks* and specifically:

- the set up of *gender task forces* for the Regional Ob1 Managing Authorities, in charge of supporting and assisting the implementation of equal opportunities and gender mainstreaming in carrying out the OP and of activating gender oriented institutional networking and contact enhancement.

The institution of *authorities for gender policies*, as an organisational and managerial solution to integrate gender mainstreaming in all the initiatives undertaken by the Regional OPs. Gender authorities were actually at first developed by some Regions (Region Sardinia) and were successively extended to other regions. The Authority for gender policies comprises the Responsible for Equal opportunities of the Managing Authority and the team of the network of equal opportunity promoters, the latter consisting of one or more managers who work in the regional administration offices and in the operative bodies of the Region. It acts as consultational body in all the policy phases

4. The Gender equality dimension in the new programming period 2007-2013: some initial considerations

4.1. A new architecture for European Cohesion Policy: brief outline

The European Commission has adopted a new legislative and programming framework for the Cohesion Policy in the period 2007-2013, which concerns a limited number of Community priorities (priority themes).

The Cohesion Policy's main purpose will be that of acting as a catalyst in key sectors such as innovation and knowledge economy, environment, risk prevention and economic services. Most importantly, it will lead to sustained economic growth, improved employment opportunities and to greater social inclusion across the European Union in accordance with the renewed Lisbon Strategy and the European Employment Strategy.

The pursuit of the priority themes are organised under a new generation of programmes grouped under three headings:

- Convergence
- Regional competitiveness and employment
- Territorial cooperation

Gender policies and actions in the EU programmes 2007-2013

Despite European and single Member State's efforts, inequalities persist and are hindering the ambitious goal of an equal participation of women and men in all aspects of society, which is still far from being a reality. The labour market still favours men over women and reflects and reinforces men's and women's perceived roles at home, polarising existing divisions although there is clear evidence that the lifestyle of the majority of women and also of many men no longer fits into these tight compartments. Clearly, gender gaps in education, training and on the labour market and the lack of support services that enable a better work-family life balance are preventing or at least slowing down progress in relation to the EES and Lisbon targets.

In the face of these persisting inequalities, Europe has adopted several instruments of policy and interventions.

The publication of the European Commission's *Road Map for Equality between women and men*, together with the *Gender Pact* agreed at the spring 2006 European Council and the establishment of the *European Gender Institute* have given a timely new impetus to the debate on the achievement of true gender equality.

In details:

- The '*Roadmap for equality between women and men*' highlights the priority areas for EU action on gender equality for the period 2006-2010. The roadmap aims, among other things, to tackle a number of inequalities such as the differences in economic dependence for women and men, and notably the gender pay gap, the persisting tensions in

reconciling work and private life or the equal representation of women and men in decision making. In particular, it will work on the following issues:

- equal economic independence;
 - reconciliation of work, private and family life;
 - equal participation in decision-making;
 - gender based violence and trafficking;
 - gender stereotypes in society;
 - gender equality outside the EU.
- The European Council of Heads of State and Government agreed on a *European Pact for Gender Equality*, which represents the commitment of the Member States to close gender gaps and combat stereotypes in the labour market, to promote a better work-life balance for all and to reinforce gender mainstreaming in all policies. In particular, the Pact includes the following measures:
 - promote women's employment in all age brackets and reduce gender gaps in employment, including by combating all forms of discrimination;
 - equal pay for equal work;
 - combat gender stereotypes, in particular those related to the sex-segregated labour market and in education;
 - consider how to make welfare systems more employment-friendly for women;
 - promote women's empowerment in political and economic life and women's entrepreneurship;
 - encourage social partners and enterprises to develop initiatives in favour of gender equality and promote gender equality plans at the workplace;
 - mainstream the gender perspective into all public activities.
 - achieve the objectives set at the European Council in Barcelona in March 2002 on the provision of childcare facilities;
 - improve the provision of care facilities for other dependants;
 - promote parental leave for both women and men.
 - ensure that gender equality effects are taken into account in impact assessments of new EU policies;
 - further develop statistics and indicators disaggregated by sex;
 - fully utilise opportunities presented by the establishment of the European Institute for Gender Equality.

- In addition, on 8 March 2005 the Commission proposed the setting up of a *European Institute for Gender Equality*, which is intended to become an important tool for the dissemination of information, the exchange of good practice and the development of technical tools to promote gender mainstreaming. The Gender Institute implementation was approved on 12 December 2006⁽²⁹⁾.
- A new Community Programme for Employment and Social Solidarity has been created in order to support the role of the European Community in implementing the Social Agenda: *Progress 2007-2013*. In particular, the programme foresees the following policy sections with different percentage of funding:
 - Employment (23%);
 - Social inclusion and social protection (30%);
 - Working conditions (10%);
 - Anti-discrimination (23%);
 - Gender equality (12%).

All these instruments of policy and interventions are fully in line with both the Commission's 2006 Annual Progress Report on the Lisbon Strategy and the Report on Equality of women and men 2006, which emphasise that strengthening the position of women on the labour market in terms of closing the gender gaps and enabling a better balance of working and private life remains crucial for the achievement of the Lisbon targets of diversifying and improving the skills of the European workforce and thus for the contribution to making Europe more dynamic and competitive, in a sustainable way and while enhancing social inclusion.

In fact, at micro economic level there is a growing body of evidence on how personnel policies that integrate a gender equality dimension are benefiting both employees and employers. Clearly, flexible, family-friendly work organisation and work-life-balance packages that, besides the needs for tailored working time arrangements, offer care and other family support services, contribute to reducing absenteeism and to increasing productivity and competitiveness of companies, local areas or regions.

At a macro economic level, maximising the economic contribution of women is paramount in order to mitigate the consequences of demographic changes that are causing the lack of labour supply and skills gaps in many occupations and economic sectors. Supporting women in developing their full potential, particularly in sectors where they are under-represented, widens and strengthens the pool of talents and skills, which is a crucial asset for Europe's competitiveness on global markets.

⁽²⁹⁾ The European Institute for Gender Equality will be set up in Lithuania (Council decision of 1 June 2006).

4.2. Equal opportunities and Gender mainstreaming in the Structural Funds programming period 2007-2013

Within the Cohesion policy framework described above, the elements connected to equal opportunities and gender equalities are stressed more in a *indirect* way (gender mainstreaming approach) than in a direct one (positive actions).

For example, objective *regional competitiveness and employment* objective (with reference to the Employment strand) refers explicitly and directly to measures to increase labour force participation of women under the heading 2b *People at disadvantage* financed by ESF.

However, it can be said that new programming gives great weight to human resources and to increase workers and companies adaptability. There is also emphasis on the eradication of social disparity through greater social inclusion and a higher standard of living, through the promotion of quality public services, including reconciliation services. All elements that, *indirectly*, may have great effects on gender equality.

This scenario is representative of the **evolution of the communitarian approach to gender issues** in the last programming periods.

- The **1994-1999 programming period** has seen the opportunity of focussing attention on the implementation of measures and programmes (for example, the programme NOW) specifically directed at women.
- The **2000-2006 programming period** has seen the introduction of the *dual approach* as a fundamental element: the differentiating and endorsing among equal opportunities (direct policies) and gender mainstreaming policies (indirect policies). In particular, the assumption of mainstreaming approach has implied the adoption of vertical priorities (positive actions to permit women to overcome access barriers to services, training, labour market) and horizontal priorities. These latter priorities aim to integrate gender equality objectives in all policies and planning measures.

This period has been particularly crucial for the evolution of gender policies and approaches and for the removal of numerous existing obstacles to their implementation.

Successful experiences achieved by many Member States show the improvements in the EU schedule. Positive experiences emerge in different fields, pertaining both to interventions planning and management and interventions specific typologies with a positive impact on gender mainstreaming.

At the same time, the general equal opportunities framework appears strongly differentiated according to the different territorial contexts in the European Union. Large gaps still exist among and inside Member States, as far as women's participation and employment are concerned. Gender mainstreaming perspective meets many resistances due to a different level of gender perception of national and local authorities, to the planning complexity (larger onus of infrastructural actions rather than actions addressed to individuals) and to the presence of several financing sources with different specific features. As far as the managerial/implementing level is concerned, the structure of equal opportunities governance presidiums in single administrations is not yet created.

- On this basis the **new programming period 2007-2013** insist with particular emphasis on the *gender mainstreaming approach* trying to consolidate and enhance the introduction of a gender equality perspective in Structural Funds according to values and aims expressed by the Treaty.

In fact, it has to be reminded that equality between women and men is a fundamental value of the Community and, according to Article 2 of the Treaty, it is one of the tasks to be actively promoted by the Community. With specific reference to gender mainstreaming, article 3 lays down the principle of gender mainstreaming by stating that in all its activities the Community shall aim to eliminate inequalities and to promote the equality of women and men.

Furthermore, Article 13 provides for pro-active measures to combat discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation. Finally, Articles 137 and 141 refer to gender equality in the relation to the labour market and stipulate equal opportunities and equal treatment at work and that each Member State shall ensure that the principle of equal pay for male and female workers for equal work or work of equal value is applied.

This latter approach informs all the new national and regional programmes that will be issued for the programming period 2007-2013 with reference to Structural Funds.

- The *Third Cohesion Report*⁽³⁰⁾ confirms that: ‘the Union’s commitment to the promotion of gender equality means that the mainstreaming approach must be far-reaching so that the impact all policies have on the gender issue is fully considered when programming and implementing’. The emphasis is on the need to guarantee the integration of actions in favour of gender equality in national and regional programmes and the gender mainstreaming – with the integration of the gender perspective into every step of the policy processes from design to implementation and monitoring and evaluation - is seen as the better tool to uncover and understand the causes of inequalities between women and men in our societies and come up with appropriate strategies to tackle them.
- This general stance is to be found in Article 16 of the *Structural Funds General Regulation*, which confirms the gender equality principle. It lays out that the Commission and member States ‘should ensure that equality between men and women and the integration of the gender perspective is promoted during the various stages of implementation of the Funds’ and that ‘the Member States and the Commission shall take appropriate steps to prevent any discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation during the various stages of implementation of the Funds and, in particular, in the access to them’. In addition to that, Article 11 stresses the importance of the presence of bodies responsible for promoting equality between men and women with reference to the framework of close cooperation, (partnership) between the Commission and each Member State.
- The *Regulation for the European Social Fund* devotes Article 3, 4 and 6 to gender equality and equal opportunities. In particular:
 - Article 6 (Gender equality and equal opportunities) declares that ‘the Member States shall ensure that OPs include a description of how gender equality and equal opportunities are promoted in the preparation, implementation, monitoring and evaluation of OPs. Member States shall promote a balanced participation of women

⁽³⁰⁾ European Commission (2004), *Third Cohesion Report*, Brussels.

and men in the management and implementation of OPs at local, regional and national level, as appropriate’.

- Article 4 (Consistency and concentration of support) defines the obligation for all the evaluations that will be undertaken in relation to ESF actions should ‘assess the contribution of the actions supported by the ESF to the implementation of the European Employment Strategy and to the Community objectives in the fields of social inclusion, non-discrimination and equality between women and men, and education and training in the Member State concerned.
- Article 3 (Scope of assistance), in defining priorities and actions that can be undertaken, underlines the importance of ‘mainstreaming and specific action to improve access to employment, increase the sustainable participation and progress of women in employment and reduce gender-based segregation in the labour market, including by addressing the root causes, direct and indirect, of gender pay gaps’.
- The *Regulation for the European Regional Development Fund* establishes *only* with reference to Cooperation objective (Article 6 – European territorial Cooperation), the possibility of financing initiatives to promote gender equality and equal opportunities. Unfortunately, no other references are made in relation to Convergence and Competitiveness Objectives.
- Finally, in the frame of the reformed EES and its integration into the new Community Lisbon Programme, the *Community Strategic Guidelines 2007-2013*⁽³¹⁾ highlight that equal opportunities, combating discrimination and promoting gender mainstreaming are essential for making progress towards achieving full employment, and reducing unemployment and inactivity. In particular:
 - Member States and regions should pursue the objective of equality between men and women at all stages of the preparation and implementation of programmes and projects. This may be done through specific actions to promote equality or to combat discrimination, as well as by taking careful account of how other projects and the management of the funds may affect women and men.
 - Specific action to increase women’s participation in employment, to reduce occupational segregation and address gender pay gaps and gender stereotyping and to promote more family-friendly working environments, and the reconciliation of professional and private life. Facilitating access to childcare and care services for dependent persons is crucial, alongside gender mainstreaming in policies and measures, awareness-raising and dialogue among stakeholders.
 - Whenever the circumstances are appropriate, tailored support should be made available to specific categories of business (e.g. start-ups or recently transferred companies) or entrepreneurs (e.g. young people, women, older workers or those from ethnic minority communities). Entrepreneurship education should also be encouraged in schools.

⁽³¹⁾ Council of the European Union (2006), *Community Strategic Guidelines 2007-2013*, Brussels

5. Suggestions and recommendations for the future

The overview of regional programmes conducted in this report, even if not exhaustive, is useful to understand to what extent a gender mainstreaming approach has been internalised not only in programmes co-financed by the ESF, but also in programmes and policies not directly aimed at individuals and equal opportunities, such as those financed by the ERDF and the Cohesion Fund. Table 10 summarises for each policy stage, the areas where GM has been most implemented and those requiring further attention and efforts.

Some important lessons on how to support gender mainstreaming in all policy making, may be derived from the 2000-2006 experience. Overall the impression is that **over the 2000-2006 period much has been done to set the necessary conditions for successful gender mainstreaming, acknowledging the legitimacy of such a strategy** and, especially in some countries, developing the necessary tools to effectively apply this principle to policy making. However, the inclusion of gender mainstreaming policies in Structural Funds must be perfected and strengthened, and more should be done to translate broad and specific objectives into practice and effective actions.

A more holistic approach addressing all the phases of the policy cycle and developing operative tools and procedures is needed, to ensure that ongoing activities are able to produce a significant impact in terms of gender equality and socio-economic development.

A specific political stance is required for this to happen, together with greater awareness of the importance of gender equality for socio-economic growth within the political and administrative culture and an improved capacity to concretely address these issues and involve the local actors.

Incorporating a gender approach into local development policies could be an important step toward mainstreaming this approach to national policy making. Indeed at the local level it is probably easier to develop the holistic approach to policy making which is at the basis of gender mainstreaming, even if some difficulties, emerging clearly in the 2000-2006 programming period, must be overcome. The main ones relate to:

- the difficulty to understand the concept of gender mainstreaming. In many cases there is still confusion between gender mainstreaming and positive actions for equal opportunity in employment, with gender equality measures only considered in the ESF dedicated measures;
- the difficulty to put gender mainstreaming into practice, especially in development policies not directly addressed to individuals such as infrastructural interventions, which require specific monitoring and evaluation skills in addition to a change in values and attitudes toward gender issues. Without dedicated support and capacity building there are risks that interest in it might fade, besides the elimination of specific intervention in favour of women, watering down gender issues.
- the lack of adequate instruments and dedicated resources (both human and financial) for the effective implementation of gender mainstreaming may also reduce its effectiveness in improving gender parity. A financial reserve within the Structural funds to support gender mainstreaming should be considered.

These difficulties must be addressed in order to avoid a decline in attention and the risk that all the elements and issues in some way connected to gender equality between men and women become just a mere formality to be respected and not an important tool to enhance and improve Europe and its citizens (both men and women). Another risk (confirmed by the few references to gender equality in the new ERDF Regulations) is that a gender perspective will not be considered in the actions supported by ERDF and Cohesion Funds, thus reducing the potential impact of gender mainstreaming in all policy making.

Section 3.2 provides a detailed analysis of lessons to be learned from the 2000-2006 programming period and suggestions for further supporting gender mainstreaming at different stages of the policy-making process. **Particularly relevant to achieve these results are capacity-building actions**, such as:

- promote gender balance in decision making on all committees relevant to the programme/measure;
- develop gender-disaggregated data and statistics at the local level and ensure that the situations, needs and interests of women and men are adequately considered during the diagnosis and policy design phases;
- take account of gender differences in policy implementation and set gender equality as an objective of programmes/measures;
- assess the potential and effective gender impact of all policies implemented;
- train public management and other relevant actors at the local level to gender mainstreaming and provide enough resources and technical support to gender mainstreaming;
- increase gender awareness among local actors and the population and promote gender equality in access to programmes/measures through specific animation and communication policies.

The following dimensions are particularly relevant, and should be considered as priorities, in this respect:

Building equal opportunities governance

If equal opportunities objectives are to become an integral part of growth and development policies, effective *equality governance* is a prerequisite. There is therefore an urgent need to adopt adequate initiatives at the various levels of intervention, such as:

- Gender expertise could be established within Government Departments and other agencies implementing measures within the cohesion and structural funds to influence a broader gender awareness within the full range of the departments/agencies activities;
- Managing authorities should encourage local networks with equal opportunity institutions, to provide information on projects proposals that could be financed by structural funds and ascertain their relevance to gender mainstreaming. They should also encourage projects promoters to include the mainstreaming objective by showing its relevance and benefits;

- Procedures to favour female participation at all levels in local development partnerships and initiatives co-financed by structural funds should be adopted, together with support to the participation of women in decision-making roles and in development support initiatives;
- the European Commission could periodically organize high level conferences on gender mainstreaming, bringing together international experts and key stakeholders, including the managing authorities of cohesion funds. This would foster awareness and promote further development of key initiatives which might then be adopted by other Member States.

Improve management and implementation skills

The implementation phase is particularly relevant for the achievement of the desired outcomes. **Programme authorities should develop management mechanisms that see the gender perspective as a qualifying element to reach set goals, and clear-cut procedures to integrate gender attention into all phases of the policy cycle.** The organisational structure of managing administrations is crucial in this respect and related to the re-organisation of administrations and to the re-definition of internal procedures and working methods. The approaches adopted may be different, ranging from *co-ordination* approaches (creation of broad-based, inter-ministerial working groups or task-forces), to *structural* ones (through the creation of new ad hoc institutions or the innovation of existing internal institutions such as, for example, the creation of parity advisors) and *strategic* ones (which focus on the development of a shared agenda for gender equality). Different interesting experiences emerge in European countries which could be the basis for a thorough evaluation and discussion.

It is however important that:

- appropriate procedures are introduced to internalise the gender mainstreaming perspective in the selection criteria, implementation methods and indicator systems;
- specific technical assistance teams are activated to support gender mainstreaming in the carrying out of project interventions;
- specific gender mainstreaming skills in programme/project management are developed either through internal training or external expertise. Equal opportunity expertise could be enriched and encouraged by the exchange of good practices.

Improving monitoring and evaluation tools

Evaluation is a process which takes place in all phases of political cycle to verify results and impacts and to support the planning and implementation of interventions. It is therefore **crucial to support the monitoring and evaluation of gender mainstreaming in Structural funds programming and implementation and its (potential) effects in gender equality and socio-economic development**, through the definition and dissemination of guidelines, criteria, methods and techniques, at European and national/local level, in order to further develop the tools and indicators which have been implemented in the 2000-2006 programming period:

- Specific tools and indicators to evaluate the (potential) gender impact of interventions (such as GIA) should be further developed and diffused, so as to support Managing Authorities in defining gender monitoring system for co-financed interventions;
- Qualitative monitoring activities should also be implemented, to derive lessons of soft issues to be considered in order to mainstream gender equality in development programmes;
- Ex-post evaluations and participative evaluations, involving a broad range of key stakeholders, should be carried out to derive indications on how to overcome the critical aspects arising from the effective implementation of the planned interventions.

Supporting institutional learning through cooperation and exchange of good practice

The Structural funds have been successful in promoting institutional learning across and within Member States. Crossborder, transnational and inter-regional co-operation should be continued and strengthened in relation to experiences and achievements in gender equality, through:

- the promotion of best practices exchange, with specific attention to those experimentations able to improve the quality of the life of men and women;
- the diffusion of relevant competences for a gender oriented development;
- the creation of an Observatory on gender mainstreaming in Structural Funds programmes/measures (our overview showed how difficult it is to derive some comparable information on gender mainstreaming in regional programmes across the EU).

Improving communication strategies

Communication strategies are particularly relevant for gender mainstreaming:

- they may increase the awareness among all key players within the European Union, and particularly those involved in the implementation of cohesion policies, that the principle of equal opportunity has to play a key role in all interventions;
- they promote widespread information about the availability of financial resources offered by structural funds to meet equal opportunity objectives.

It is then necessary that politicians and decision makers are fully informed on gender-relevant issues and activities emerging from the implementation of cohesion and structural funds and elsewhere in order to influence their decision-making across the full range of their responsibilities.

Communication campaigns launched by the Managing Authorities should also be used to emphasise gender issues and programme achievements, including the socio-economic role of women, the importance of services accessibility and the promotion of increased female participation to the social and economic life.

Such campaigns should become an integral part of Structural Funds Communication Strategy both nationally and regionally – with clear-cut objectives aimed at eradicating stereotypes and prejudice whilst also promoting the principle of equal opportunities.

Table 10. Progress in gender mainstreaming by policy area and policy phase

Policy Phase	Policy areas showing progress in gender mainstreaming	Policy areas requiring further gender mainstreaming effort
Context analysis	<ul style="list-style-type: none"> ▪ labour market and occupational conditions ▪ Training and education ▪ Work –life balance (usually Northern European countries) 	<ul style="list-style-type: none"> ▪ Sex-disaggregated data (use of services and infrastructures) ▪ Reconciliation of work and family life (Southern European countries) ▪ Physical, economic and social infrastructures (not related to childcare or elderly care provisions) ▪ Women's participation in political life ▪ Gender SWOT analysis
General strategy	<ul style="list-style-type: none"> ▪ Adoption of a dual approach ▪ Attention to barriers to economic inclusion faced by specific target groups, among which women (Northern countries) ▪ Attention to barriers to economic inclusion of women (Southern countries) ▪ Focus on economic and labour market inclusion (dependent employment and self-employment) ▪ Focus on community revitalization and social economy 	<ul style="list-style-type: none"> ▪ Low attention to the connection between gender and local development ▪ Low attention to the gender dimension in systemic general objectives (not individuals-related) ▪ Low attention to the early assessment of alternative scenarios and programmes and to projects to promote gender mainstreaming ▪ Low attention to anticipating gender impacts of the chosen strategy (GIA)
Specific objectives & measures	<p>Gender-specific measures consider:</p> <ul style="list-style-type: none"> ▪ Women's entrepreneurship ▪ labour market conditions and training ▪ Participation to local development ▪ Women-friendly services 	<p>Still little attention to:</p> <ul style="list-style-type: none"> ▪ gender and innovation policies; ▪ gender and infrastructures ▪ gender and local development ▪ gender de-segregation (economic sectors)
Resource allocation	<ul style="list-style-type: none"> ▪ Threshold budget for positive actions and equal opportunities (some countries) ▪ Budget quota devoted to gender priorities (childcare) ▪ Budget quota devoted to gender targets (lone parents, part-timers) 	<ul style="list-style-type: none"> ▪ Still low use of tools and methodologies to verify and assess the amount of financial resources dedicated to mainstreaming (not only equal opportunities) (i.e. gender budgeting applied to Structural Funds)
Selection procedures	<p>Formal commitment in the OPs through:</p> <ul style="list-style-type: none"> ▪ Gateway criteria (Anglo-Saxon countries) ▪ Consideration of the cross-cutting themes ▪ Proportion of the total score attributed for an assessment of a project's contribution to equal opportunity ▪ Additional weighting in the selection criteria for projects which involving a high proportion of targeted group beneficiaries (women) ▪ Additional scores to projects actively contributing equal opportunity (Continental and Southern countries) 	<ul style="list-style-type: none"> ▪ Need to identify more specific and tailor-made selection criteria concerning policy fields that are not financed by ESF ▪ (Support to the use of) Gender auditing procedures ▪ (Support to the use of) Gateway criteria

Policy Phase	Policy areas showing progress in gender mainstreaming	Policy areas requiring further gender mainstreaming effort
Monitoring and evaluation	<ul style="list-style-type: none"> ▪ Development of general gender sensitive and gender-relevant indicators ▪ Gender Impact Assessment methodologies and tools ▪ Thematic evaluations 	<ul style="list-style-type: none"> ▪ Design of specific gender-relevant indicators ▪ Limited spreading of gender evaluation for all phases of the policy process and all policies ▪ Little development of 'gender-sensitive monitoring systems ▪ Reinforcement of (common) methodologies and tools for GIA ▪ Recourse to gender training to personnel engaged in the management of programmes and selection/evaluation of projects
Managing bodies	<ul style="list-style-type: none"> ▪ Gender consultative bodies ▪ Gender experts ▪ Gender (local and national) networks 	<ul style="list-style-type: none"> ▪ Create gender mainstreaming and equal opportunities expertise within managing authorities ▪ Enhance appropriate coordination mechanisms ▪ Reinforce information and communication strategies ▪ Reinforce the (national and transnational) exchange of best practice ▪ Create an Observatory on gender mainstreaming in all Structural Funds

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Policy Department
Structural and Cohesion Policies

**GENDER MAINSTREAMING
IN THE USE OF STRUCTURAL FUNDING**

REGIONAL DEVELOPMENT

22/05/2007

EN