

# Towards gender neutral policy-making

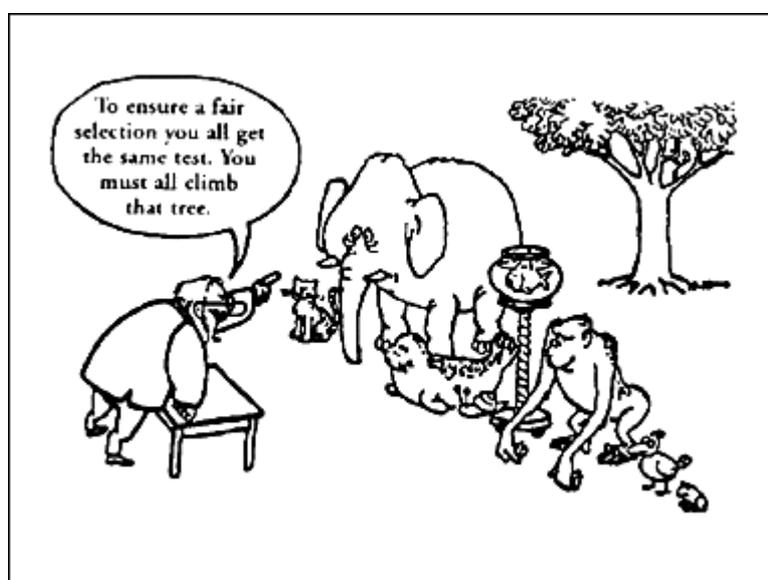
A case study on the implementation process of gender  
mainstreaming in the European Social Fund (ESF)



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## A case study on the implementation process of gender mainstreaming in the European Social Fund (ESF)

### “Equal Opportunities”



Source: NPD Gender Equality Unit Ireland

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## Preface

### *Feminism*

*the belief that women should be allowed the same rights, power and opportunities as men and be treated in the same way, or the set of activities intended to achieve this state.*

From: Cambridge advanced learners dictionary

Many times during this research process I found myself defending my topic of research to my friends and acquaintances. It seems gender equality sounds like feminism, and feminism is somehow a dirty word and associated with women who blame men for everything. I can imagine, because I experienced it myself, that working with Gender Mainstreaming does not only ask for organizational change but also very much for a normative change.

As for me, I have been passionate about this topic for quite some years now. When I started my study: Public administration, I knew from the start I wanted to write my master thesis on Gender Equality policies. One of the reasons for this is because it is the kind of issue which I get confronted with in daily life, of which I discuss the consequences of with friends because it directly affects us. Over 55% of University students graduating are women, nevertheless, it is not reflected in society; not in decision-making positions in public and private organizations and not in the academic world. This still astonishes me, but above all makes me want to research on how institutions can contribute in a more efficient way to a solution to this unequal balance of power.

The nine months I worked for the European Commission (EC) have been a great opportunity to experience the inside of an organization and to look at the ESF from the Commission's point of view. There are numerous people I would like to thank. To begin with; my colleagues at the European Commission, especially Gerhard Braunling, the people of the EC gender equality unit and the several external gender experts. Ms. Dijkstra, my academic advisor, for helping me and advising me. The very helpful staff at the ESF and experts in the different countries for their cooperation and enthusiasm. Thanks to all my friends for the good advice and cheering words and a very special thanks to my 'thesis coach' Nienke Dries and thanks to Thomas van Oortmerssen for putting up with all my ideas about gender mainstreaming

## Summary

In this qualitative research the aim is to find out what the hindering and fostering factors of the implementation of Gender Mainstreaming (GM) were, when it was first introduced as a concept in the ESF in the funding period 2000-2006. The reason for this is to learn lessons from the positive and the negative aspects and to use this knowledge in the future within ESF agencies. The research question is:

*"What factors promote and hinder the implementation of Gender Mainstreaming in the European Social Fund"*

A conceptual analysis of GM points out that GM is above all a complicated process. The confusion around the exact meaning of the concept can cause problems in the implementation process. I define GM in policy making as follows: *"Verifying how men and women are affected differently by policy and if needed revising policy in order to create a more equal outcome"*.

Implementation theories have been researched from different approaches; organizational, sociological and political. The influencing factors which were drawn from these theories were put in a list of twelve fostering factors. Each of these factors were under one of the phases: Organizing, Learning, Assessing, Redesigning (OLAR) in the implementation process in order to put it them in a context. This created the OLAR checklist for GM

There is little research on how to measure whether GM is implemented. In order to measure GM in the cases; Brandenburg, the Netherlands and Ireland, I developed a list of nine implementation indicators. The GM indicators showed that in Ireland, as for the Operational Programme (OP) and the evaluation, GM is well-integrated; there is attention for explaining the concepts as well as a strategy on how to implement the concept. In Brandenburg, the consideration of the gender mainstream approach in the programme implementation and monitoring as well as in the authorization of grants is only rudimentarily achieved. The Netherlands did not commit itself to the concept on paper nor in practice and the conclusion is that GM is not implemented at all in this ESF agency. In practice, only according to the Irish ESF policy-maker and gender expert and project leader, GM is implemented. According to the all three Dutch interviewed actors, it is not implemented at all and according to the policy maker in Brandenburg the concept is not-well implemented throughout the organization.

The most fostering factors for the implementation of GM are; National and Regional political support, a specific description of activity, broad participation of actors and a broad responsibility for GM, pressure and support from the European Commission, the creation of new unit to handle GM, communicating the win-win strategy was considered a big fostering factor in all agencies although only Ireland really communicated it. Everybody but the Irish policy maker and project leader have suggested to rename the concept. Another hindering factor which was mentioned Brandenburg and the Netherlands was the lack of measurable goals and the consequences to come with it. Additional fostering factors which came up were; Top down management, both Brandenburg and the Netherlands mentioned that the lack of a strong top-down management and commitment hindered the implementation of GM. The Dutch project leader stated that development of new policy structures is a fostering factor.

The most important conclusion that can be drawn from this research is that the concept of Gender Mainstreaming is very complex and difficult to implement. This conclusion shows that GM in its current form is not the perfect instrument to solve gender inequalities as some scholars and institutions claim it is. There is a gap between on the one hand, what the European Commission considers the progress is and on the other hand, what it is in reality, as can be seen from the case selection and its expected progress. I argue that it would be good idea to revise the concept of GM and make it a more practical and accessible instrument to achieve equal outcomes and perhaps rename it in a way that the concept explains itself, as for example, gender proof.

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Cartoon credit: Richard Chapman

## List of acronyms

AT	Austria
BE	Belgium
BG	Bulgaria
CH	Switzerland
CoP	Community of Practice
CY	Cyprus
CZ	Czech Republic
DE	Germany
DG	Directorate General
DK	Denmark
DE	Germany
EC	European Commission
EE	Estonia
EL	Greece
EMPL	Employment
EP	European Parliament
ES	Spain
EU	European Union
EU-25	25 Member States of the European Union
EU-27	27 Member States of the European Union
ESF	European Social Fund
FI	Finland
FR	France
GIA	Gender Impact Assessment
GM	Gender Mainstreaming
HR	Croatia
HU	Hungary
IE	Ireland
IS	Iceland
IT	Italy
LI	Liechtenstein
LT	Lithuania
LV	Latvia
MA	Managing Authorities
MS	Member States
MT	Malta
NGO	Non-Governmental Organization
NO	Norway
NL	the Netherlands
OP	Operational Programme
PL	Poland
PT	Portugal
RO	Romania
SE	Sweden
SI	Slovenia
SK	Slovakia
SES	Structure of Earnings Survey
TR	Turkey
UK	United Kingdom
UN	United Nations

## CHAPTER I

# INTRODUCTION AND AIM OF THE RESEARCH

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**Chapter I** This chapter introduces the reader to the attended matter of gender equality in Europe. The first three paragraphs explain the problems and introduces the most important policies and actors and gives a brief insight into the concept of Gender Mainstreaming. The latter three paragraphs describe the research questions, methodology and structure of the thesis.

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## 1. INTRODUCTION AND AIM OF THE RESEARCH

*“The continued inequalities that exist between women and men –in terms of employment, education and training, entrepreneurship and reconciliation of professional and family life- harm the achievement of the development objectives of growth, competitiveness and employment, as well as the social and economic objectives of improved equality for all” (Braithwaite 1999: P.2).*

The quote mentioned above from Dr. Mary Braithwaite, a leading expert in gender mainstreaming, shows that the different position of men and women on the labour market influences social positions and inclusion in society. The latest “Gender Pay Gap campaign” (2008) of the European Commission (EC) focusing on Gender Equality in Europe concerns the apparently never closing gender pay gap. This makes it another example that equality is far from a being a fact in Europe. The concept of Gender Mainstreaming is one of the European Commission’s newest strategies to change the continuous inequalities between men and women. The aim of this research is to find out what promoted and hindered the implementation process of Gender Mainstreaming in the European Social Fund (ESF) in the funding period 2000-2006. In this research the implementation process of Gender Mainstreaming into the ESF will be approached from a public administrative view. Therefore it will focus on the policy-making and policy implementation process. In what ways can policy-making contribute to a more equal social economic position between men and women? One example of how policy-making resulted in contributing to the opposite, a more unequal position between men and women, can be found in the patriarchy history. Throughout history mostly men occupied decision making positions in the process of policy development. A logical consequence of this was that for developing policy the male person was taken as the norm. Because of this male-based norm, policy can easily have a more negative outcome for women and therefore, for instance, hold back their position on the labour market in certain ways. Today still the larger part of people in decision making position are men. According to the European Commission equal opportunities should exist for all, therefore the EC encourages to develop policies and programmes which have equal outcomes for men and women. It is difficult to fight gender inequalities when it is been fed in the core of policy making processes.

One way to achieve equal opportunity with policy-making is to take into account, in every policy making process and every planning process of programmes, that the outcome of these should be equal for both sexes, this is called Gender Mainstreaming. One of the major problems with the principle of Gender Mainstreaming is that is a broad concept and therefore it can be difficult to implement by several layers of government and organizations. The European Commission aims to support and stimulate national and regional governments and organizations with this implementation process. This research therefore focuses on the policy- making and implementation process of Gender

Mainstreaming. This first chapter introduces the concepts: gender equality, gender mainstreaming and the European Commission in a historical conceptual way and presents the research design.

## **1.1 The development of gender equality policies in the European Union**

The discussion and development on gender policy within the European Union started in the seventies of the last century. The European Community, however, already stated in the Treaty of Rome<sup>1</sup> in 1957 that men and women should receive equal pay for equal work. This makes this the first notification of gender policy in the European Union (Treaty of Rome, 1957). A few interesting shifts have been made in the approach of gender policies since the very start of it. Starting with the shift from the emphasis on protection of women towards the participation of women in Europe. In the seventies and eighties gender policy makers pushed for reforms in policies which address women's rights in the workplace, in social security and making an effort to protect women from sexual harassment (Rossilli et al, 2000). When we now take a look at the policies on gender for the labour market, it mostly emphasises on women participation in labour, trainings, providing childcare, regulating the percentage of women that should be in decision-making positions etc.

Furthermore it also shows that the perspective of women went from 'victims' towards possible 'solutions'. Whereas first women participation policies were developed to protect women from exclusion, later on women were more and more seen as solution for the development of the economy and shortage on the labour market.

The European Commission mentions a higher participation rate of women at the labour market as an important solution for the demographic aging to keep the social security system working. Also, when it comes down to protect and maintain the competitive position of Europe and the knowledge based economy, women are mentioned as an important group who should be more socially included in society. As women account for the greater part of the tertiary educated people in Europe, 55% to be exact (Eurostat, 2008), this is a logical approach. The optimal use of human capital, together with social reasons is a strong incentive for Europe to develop gender equality and women participation policies.

The fact that current gender policies on labour are focussed mainly on the participation of women in labour markets means that there is still a gap between men and women in this field. The European Union tried to combat overt discrimination with equal treatment law, as for instance ensuring equality in pay between men and women in the Treaty of Rome. The starting point used to be: treat men and women the same and the outcome will be the same. But women often have a different starting position

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<sup>1</sup> Treaty of Rome (1957): the article related to equal pay, art. 119 is now art 141.

than men and have to deal with, for example, prejudices. On top of this, the fact that policy is mostly developed by men does not make policy always as equal as it seems. Policy can have different outcomes for different people with different socio-economic baggage. For these reasons, Gender Mainstreaming is brought into the picture. Now the principle of Gender Mainstreaming is seen as one of the most promising gender equality policy tools (EQUAL guide on GM, 2004).

## **1.2. The principle of Gender Mainstreaming**

The European Social Fund uses the following definition for Gender Mainstreaming:

*‘Gender mainstreaming may be described as ‘the (re)organisation, improvement, development and evaluation of policy processes, so that a gender equality perspective is incorporated in all policies, at all levels and at all stages by the actors normally involved in policy-making’<sup>2</sup> (Council of Europe 1998: 12).*

In order to explain Gender Mainstreaming the two concepts will first be explained separately. The word gender refers to the socio-economic and cultural differences and interactions between women and men, which may vary from one population group to another and in time. Gender differs from sex which refers to the fixed, biological differences between women and men (Braithwaite 1999). The word mainstream may not be easy to translate into different languages, but has been chosen for a clear reason. After all, the "mainstream" is that which is normal, standard, regular. In terms of equal opportunities and the European Social Funds it indicates that equality issues must be treated as a "standard" and "regular" part of programming, from the initial analysis and formulation of objectives and strategy through the final evaluation (Braithwaite 1999).

Gender Mainstreaming is different from previous approaches to equal opportunities in several ways. Previous approaches have been mainly focussing on measures specifically in favour of women, making an effort to try to reduce the gender gap by giving them support which enables them to participate equally in economic and social life. These previous approaches assume that gender inequality can only be solved by women alone; however, the disparities that continue to exist between men and women are not only caused by weaknesses in the qualifications, experiences and situations of women or to the existing prejudice towards women. These inequalities are also due to structural

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<sup>2</sup> However, literature on Gender Mainstreaming mentions different definitions and even within the European institutions, definitions differ. Therefore, in the second chapter there will be a conceptual analysis, ending in a clear definition of Gender Mainstreaming.

inequalities in the organisation of working and family life, this as a result of conscious and unconscious biases in public and private policies. Women and men do not have the same roles, resources and needs. They also do not have the same powers in the private and public sectors, for instance in terms of decision making. Being blind to these differences leads to policies and programmes which do not bring equal benefits for women and men and even tend to place a greater burden on certain groups than on others (Braithwaite 1999).

Gender Mainstreaming does not replace positive actions for women. On the contrary, because of the persisting gender gaps, the European Union follows the so-called dual track: Gender Mainstreaming plus specific actions to advance women. The latter is one way to remedy past discrimination and to compensate for existing inequalities (COP's, ESF live definition).

Most of the policies may appear gender neutral but can have a big impact on women. This impact can be negative, positive or neutral. When differences between men and women, and different expectation patterns of men and women are not considered when developing and implementing policies, it can have an unintended negative or positive effect. The objective of Gender Mainstreaming is to develop policy which has an equal outcome for both men and women.

### **1.3. Actors; their responsibilities and liaisons**

Before the research structure will be explained, first the different actors and their role in this matter will be introduced. Next to the role of these actors, the liaisons between the actors will be explained

#### **1.3.1 The authority of the European Commission**

The European Commission and European Member States work together on the bases of shared management and co-financing in the European Social Fund (ESF), a fund which promotes economic and social cohesion. The guidelines for action are designed at EU level. This makes it important to find out how much influence the EC has when it comes down to implementing policies. It is clear that the EC has some authority on the program designing level, but what kind of authorities and resources does the EC have regarding implementing and how can and does the EC influence this process?

In 2006 the ESF-regulation of 1999 was revised and after a lot of amendments from the member states, it was decided to give the EC less power in the decision making in the MS. This shows in the new and repealed regulation of 2006, where the EC has adapted some more details because it does not have the power to change things during the funding period. In spite of all this the EC can use its political power and resources. Gender Mainstreaming was at the time of the funding period from 1999 until 2006, being advanced through a new method of stimulating policy developments across the

Member States of the EU, that of the open method of policy coordination. With this method the EU assists its member states in developing their own policies (Radelli 2003:43) instead of telling them which policies to adapt and implement. Although targets and principles are set at EU level, the implementation of them is left to Member States, which report annually on their National Action Plans. These plans are evaluated by the EU Commission. The effectiveness of the open method of policy coordination depends on the extent to which processes of argumentation and development of shared norms can be effective in really changing policy (Walby 2004:19) This means that, in this case, the EU Commission needs to supply the Member States with processes of argumentation and motivation, as well as it can use its political pressure. As much as the open method of policy coordination depends on motivation, this does not apply to the legally binding Directives; here the evidence is more robust. These issues and the impact of the European Union concerning gender equality and policy-making should be kept in mind when researching the barriers and success factors for gender mainstreaming of national ESF policies.

### **1.3.2 The European Commission (EC) and the European Social Fund (ESF)**

The European Commission has four Structural Funds which allow the European Union to grant financial assistance to resolve structural economic and social problems<sup>3</sup>:

- The European Regional Development Fund (ERDF), whose principal objective is to promote economic and social cohesion within the European Union through the reduction of imbalances between regions or social groups.
- The European Agricultural Guidance and Guarantee Fund (EAGGF - Guidance Section), which contributes to the structural reform of the agriculture sector and to the development of rural areas.
- The Financial Instrument for Fisheries Guidance (FIFG), the specific Fund for the structural reform of the fisheries sector.
- the European Social Fund(ESF), set up to reduce differences in prosperity and living standards across EU Member States and regions and promotes economic and social cohesion.

The aim of the ESF is promote employment in the EU; it helps Member States in equipping Europe's workforce and companies to face new global challenges<sup>4</sup>. To achieve its goal the ESF has three main instruments.

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<sup>3</sup> [www.ec.europa.eu](http://www.ec.europa.eu): Regional policies

<sup>4</sup> Website: [ec.europa.eu/employment.eu](http://ec.europa.eu/employment.eu)

- Funding is spread across the Member States and regions, in particular those where economic development is less advanced.
- It is a key element of the EU's strategy for Growth and Jobs targeted at improving the lives of EU citizens by giving them better skills and better job prospects.
- Over the funding period 2007-2013 some €75 billion will be distributed to the EU Member States and regions.

The ESF strategy and budget is negotiated and decided between the Member States, the European Parliament and the European Commission. In this way, seven-year Operational Programmes (OP) are planned by the Member States together with the European Commission. These OP's are then implemented by a wide range of organisations, both in public and private sphere. Many different kinds of participants can be included in the ESF programmes, such as: NGO's, social partners, public administrations, enterprises and all kinds of other relevant stakeholders. In the Operational programmes the planning of a coming funding period is described, together with their aims and objectives. Out of this planning, projects originate.

The ESF does not fund these projects directly from Brussels; the funding is available through the member states and regions. As mentioned before, the member states agree on their Operational Programmes with the European Commission after which the EC distributes the funding over the countries. Potential participants can contact the Managing Authorities in their own country and apply for funding there. The European Social Fund is firstly based on the principle of shared management. The guidelines for ESF actions are designed at European level, but the implementation is managed by the relevant national or regional authorities of each member state. These authorities do all the preparatory work for the Operational Programmes and they select and monitor the ESF projects.

Secondly the ESF is based on the principle of co-financing. The financial support of the ESF projects is always shared with national public or private funding. The level of EU intervention depends on the situation in a member state. Based on the situation and socio-economic factors, the co-financing may vary between 50% and 85% of the total cost of the intervention. The level of ESF funding differs from one region to another depending on their relative wealth (EC: ESF website).

### **1.3.3 European Social Fund and the principle of Gender Mainstreaming**

The European Social Fund's main target is to promote economic and social cohesion. Though within this, gender equality is an important issue. The importance of gender evolves from the fact that economic and social cohesion are topics where the participation of women on the labour markets is more or less a premise. Therefore, as well as promoting equal opportunities, the aim of this ESF priority is to support the Lisbon target of raising the average level of women's participation in the workforce to 60% by 2010 (EC: website ESF).

The European Social Fund has ten specified fields of activity, two of them contain actions that focus on women: 'Women and jobs' and ' Fighting discrimination'. The ESF thinks of equality between women and men as a fundamental feature of our democratic society, an important element of the EU Strategy for Growth and Jobs, and essential for the European Union to sustain its prosperity.

The importance of gender equality in employment is reflected in the ESF programming, which comprises two approaches:

1. Gender Mainstreaming, which incorporates the gender dimension into all ESF fields of activity;
2. Specific actions aimed at getting women to work and sustaining them there; like the action fields: 'Women and Jobs' and 'Fighting discrimination'.

In line with the Lisbon Agenda for Growth and Jobs, part of the fund is to ensure that men and women can benefit equally from this main financing instrument of the European employment and cohesion policies. Only when both men and women across all groups of the population are in a position to realize their full potential, Europe will be able to pursue the favourable development of its labour market and economy. Gender Mainstreaming is anchored in the General Regulation of the European Structural fund and in the provisions of the European Social Fund regulation. These place various obligations on Member States and the Commission to ensure equality between men and women and to integrate a gender perspective into the implementation of the Funds<sup>5</sup>. This means that Member States who receive funding, have to commit themselves to the concept of Gender Mainstreaming by integrating it into their Operational Programme. The EC monitors the Member States by evaluations and a monitoring committee.

#### **1.3.4 Gender Equality in the light of current European policy challenges**

Gender equality is a fundamental right and a common value of the European Union. Next to being a matter of social justice, the elimination of gender inequality is also a matter of economic necessity. The European Social Fund can contribute to the employment objectives and targets of the **Lisbon Strategy for Growth and Jobs** with particular emphasis on the strategy's three main objectives:

- Full employment, quality and productivity at work
- Social cohesion
- Social inclusion

Gender equality policies are absolutely essential to reach each of these key objectives.

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<sup>5</sup> Website: Gender mainstreaming: an asset for ESF management

Gender equality in employment is a key element in generating strong growth and creating jobs. In this matter gender equality can be further illustrated by putting it in a broader view of the three most important trends that are determinative for the current policy challenges:

1. Demographic aging, to carry the burden of the aging population, the government will have to activate those groups which are currently not fully participating in the labour market. Women are an important part of this non-active group. The proportion of men of working age still exceeds that of women throughout the European Union.

2. Knowledge-based economy: the quick development of technology puts a lot of pressure on employers and employees. One of the consequences of the increase of the knowledge intensification is an increasing demand for highly skilled employees. This increasing demand will lead to a shortage of highly-skilled employees. Women can play an important role in providing this demand, whereas more women than men obtain university degrees or the equivalent. The gap between men and women in this respect has, moreover, tended to widen in recent years in most countries.

3. Globalization: because of the growth of international commercial flows, Europe has to strengthen its competitive position. The fast rise of the Asian economies and their cheap workers and production development, will put pressure on low-skilled people in Europe. Again, if Europe wants to improve its competition position, it must use all its resources and not waste valuable human resources nor create social and economic exclusion. Therefore it is also very important to motivate women to develop themselves on the labour market.

## 1.4. Research design

### 1.4.1 Research motive

The central motive of this research can be phrased as: giving insight on the practice of implementing Gender Mainstreaming in the ESF, as well as presenting practical guidelines on which factors motivate and hinder Gender mainstreaming.

Article 2 of the EC Treaty:

The Community shall have as its task, by establishing a common market and an economic and monetary union and by implementing common policies or activities referred to in Articles 3 and 4, to promote throughout the Community a harmonious, balanced and sustainable development of economic activities, a high level of employment and of social protection, **equality between men and women**, sustainable and non-inflationary growth, a high degree of competitiveness and convergence of economic performance, a high level of protection and improvement of the quality of the environment, the raising of the standard of living and quality of life, and economic and social cohesion and solidarity among Member States.

This fragment from the EC treaty, mentioned above, proves just how crucial the EC considers gender equality to be in Europe and explains its great responsibility in achieving this goal.

*"Gender Equality is a fundamental right under the Treaty and a priority policy of the Union....Although progress has been made, more needs to be done!"*

(Commissioner of Employment, Social Affairs and Equal Opportunities, Mr. Spidla, 2005)

As Mr. Spidla mentions, there is still a lot to be done to achieve a more gender equal Europe. Currently, the European Social Fund considers Gender Mainstreaming as one of the most important tools and processes to overcome gender inequality within the European Union. Nevertheless, the assumption of the European Commission is that the attention for Gender Mainstreaming in the Member States' Managing Authorities is perhaps a bit shallow and that Gender Mainstreaming is being mentioned but not being implemented. This is a problem because at the level of the Managing Authorities the practical part of the implementation process is done. The European Commission has a task to fulfil when it comes down to gender equality, as mentioned in the paragraphs before. The principle was introduced in the funding period 2000-2006 and the EC hopes to present some insights for the ESF to moderate the implementation process. Therefore this research is conducted by the European Commission, in order to support and assist Managing Authorities with the implementation of the principle of Gender Mainstreaming.

#### **1.4.2 Research objectives and aim of the research**

This research and its outcome can contribute in the following ways:

- A helpful tool to know what advances Gender Mainstreaming and what the barriers are to implement the principle of Gender Mainstreaming in the most effective way in order to reach the Lisbon targets.
- An insight in the progress made by the ESF in the period 2000-2006 on the matter of Gender Mainstreaming
- A useful recommendation on how to use Gender Mainstreaming effectively
- An evaluation tool (based on the motivating factors, programmes can be evaluated more effectively)

The aim of this research is on a short term to find out what promotes and hinders the implementation process of Gender Mainstreaming in the European Social Fund in the funding period 2000-2006. An overview of the factors which motivated Gender Mainstreaming can help EU Member States

achieving a better implementation whereas the hindering factors can be dealt with based on forehand knowledge.

The long term objective of this research would be advising ESF agencies on success factors and barriers when using the principle of Gender Mainstreaming and in this way motivate and advance them in the use of the principle. A sub objective of this research is to see whether the Member States are content with the EC policies around GM and where they could revise it and adjust it to create a better policy fit.

Positive progress in the use of the principle of Gender Mainstreaming is fulfilled when the gender perspective is incorporated in policies and programmes. It does not mean that the outcome has to be measured and proven to have a positive effect on the gender equality on the labour market.

### **1.4.3 Research question and sub questions**

The integration of all the sub questions will lead to an answer to the central question in the conclusion of this thesis

#### **Central research question:**

*"What factors promote and hinder the implementation of Gender Mainstreaming in the European Social Fund"*

#### **Sub questions:**

1. What is Gender Mainstreaming and how can it be defined?
2. Which influencing factors on implementation of the principle of Gender Mainstreaming can be found in the social science literature?
3. By which indicators can the implementation of Gender Mainstreaming be measured?
4. To what extent was the principle of Gender Mainstreaming used when developing projects and policies in three countries in the period 2000-2006, within the ESF agencies?
5. Which factors fostered and hindered Gender Mainstreaming within the ESF in the period 2000-2006?
6. In what way could the ESF have a more effective implementation of the principle of Gender Mainstreaming?

#### **1.4.4. Relevance**

##### **Practical and policy relevance**

This research is of practical relevance for, not only the European Commission, but also ESF agencies in the member states and even other organisations working with Gender Mainstreaming.

It is important to find out what the success factors and barriers are of Gender Mainstreaming in ESF. With these results, the EC can advice the ESF in each Member State on what the possibilities are when using the principles on Gender Mainstreaming. Also this research can be used as a starting point for further, for instance, comparing research on the integration process of the principles of Gender Mainstreaming. According to the EC; without the implementation of Gender Mainstreaming in the heart of policy making, there will still remain policy which will have a gender-negative outcome. And even though there are special gender policies, the gender gap will remain. Without the use of gender mainstreaming there will not be a horizontal, broad implementation of gender equality. However, since developing gender equal policies and moreover gender mainstreaming are relatively new administrative concepts, it is important to see how this new concept develops.

Next to the fact that gender equality is a fundamental right and a common value of the European Union, it is also a matter of economic necessity. Within a short period, the concept of Gender Mainstreaming has grown to be well known in the administrative world. Unfortunately in most cases it is being used as a policy slogan rather than a policy strategy that has been implemented effectively. With this research I would like to contribute to an effective and efficient way to really implement Gender Mainstreaming and to a more gender equal Europe and the important matter of the increasing participation of women on the labour market.

##### **Academic relevance**

Gender Mainstreaming is a relatively new concept in the science of public administration and policies. The relevance for the science of public administration and policy would be to contribute to the insights on mainstreaming gender in all policies. Although research is conducted on the principle of Gender Mainstreaming, up to now, there is little research to be found on specifically measuring the extent to which Gender Mainstreaming is implemented. The interesting aspect of this case is that is a very pure form of policy making. Daly (2005: 435) pleads to institutionalize equality: " The distinctiveness of the gender mainstreaming approach is that it seeks to institutionalize equality by embedding gender sensitive practice and norms in the structures, processes and environment of public policy"(Daly 2005: 435). The aspect of gender has to be considered in the heart of the policy making process, every time a new policy is being developed, on what area so ever. With my knowledge of Public Administration I will make a combination of theories on implementation of policies and theory on Gender Mainstreaming. With these two theories combined and applied on a practical case I will develop

indicators for the implementation of Gender Mainstreaming and fostering factors in this process, with this, I hope to contribute to the academic world in a theoretical and empirical way.

## 1.5. METHODOLOGY

To make use of different kind of research methods to collect data is called triangulation; it is convenient to look at the research question from different perspectives. This qualitative research can be divided into two different kinds of research;

1. literature study
2. case study
  - document analysis
  - interviews

**Literature study.** This part of the research is a preliminary investigation in order to research the definition of concepts, theories and will eventually evolve in a list of indicators which will be tested in the comparative case study.

The aim of the literature research is to find out what has been written on Gender Mainstreaming and on implementation of policy. The literature research is conducted in four phases, which are the following: phase 1: how is Gender Mainstreaming described and defined in literature? Phase 2 is focusing on what scholars consider an effective use of the principle of Gender Mainstreaming evolving in the question: when is Gender Mainstreaming considered an implemented policy? In the next phase the goal is to find out what authors consider motivating and hindering factors for the implementation process and their empirical findings so far. The final phase is to research theories on the implementation process of policies and present an overview of carried out research.

**Case study:** In order to answer the research questions I will make use of a comparative case study. A case study is a strategy for doing research which involves an empirical investigation of a particular contemporary phenomenon within its real life context using multiple sources of evidence (Yin: 1981 in Robson 2005:178).

This case study is a combination between a 1) Policy research as well as a 2) Comparative research, which makes it a comparative policy research. It is a policy research because it is used to understand and explore a public policy issue. In “Qualitative data analysis for applied policy research” Richie & Spencer (1994) distinguish four qualitative methods of applied policy research, namely: contextual, diagnostic, evaluative and strategic. This research will have an evaluative approach; because it evaluates the ESF funding period 2000-2006 and focuses on what effects the successful delivery of implementation of the principle of Gender Mainstreaming. Within this kind of research there is a common need for generated data which usually consists for a great part of document analysis. Furthermore there is also a need to collect new data, this is usually done in the form of individual

interviews or group discussions (Richie & Spencer 1994). To collect both generated and new data I will make use of a document analysis followed by individual interviews.

The comparative part of the research lies in the fact that it comparing in two different ways:

1. **A cross-national comparison**, between European member states
2. **A longitudinal comparison**, over a certain period of time (ESF funding period 2000-2006)

Cross-national comparative research of countries with different achievements in extent of Gender Mainstreaming may highlight the factors promoting and hindering this success. Longitudinal research contains the fact that there is a distinct moment of measuring within a certain period. In this case this is the beginning (1999-2000) of the first ESF funding period and the end of the ESF funding period (2006-2007).

As mentioned before, case study, typically involves multiple methods of data collection (Robson 2005:178). In this research the data collection on the cases will be conducted in the form of document analysis and an interviewing phase.

**Documentary analysis:** The list of indicators set up in the first part of the research will be the guideline in the documentary research. These factors will be analysed and looked for in the Operational Programmes and other available policy documents of the three countries chosen for this research. How do they describe Gender Mainstreaming in their Programmes. Did they all use the same definition and do they agree on the meaning of it and how to use it? Do the Operational programmes mention how they are going to reach their targets? What other documents do they use in the implementation phase? Specific documents which will analyzed in all three cases are:

- Operational Programme
- Mid-term Evaluation
- End Evaluation

**Interviews:** the interviews with ESF Policy-makers, Project leaders and external gender experts on the indicators for Gender Mainstreaming are used to check the information conducted in the document analysis. Moreover it also used to find out if procedure were implemented as described in the documents. Next to this, there will be attention for their ideas and opinions on the principle of Gender Mainstreaming.

## **Cases**

To analyze what factors can promote and hinder gender mainstreaming in the ESF a cross-national comparison will be made between two European member states and a European Region. Since it is impossible to research all European member states in a short period of time , I chose to conduct research in three different countries. In order to estimate which countries I should research, I held

several interviews with one of the gender and ESF experts of the European Commission. Together we decided that the major indicator on which the choice of countries relies upon, will be the expected extend of implementation of Gender Mainstreaming. The gender expert suggested a few countries with a variety in extend of implementation. Language was a limitation in the choice for the cases and so the selection consists of western European countries. According to the expectations of the gender expert the greater part of the cases has implemented Gender Mainstreaming quite well.

**Germany/ Land Brandenburg:** in Germany I chose to focus on a 'Land' instead of on the Federal level, since the implementation of Gender Mainstreaming in the ESF programmes differs between 'Bundeslander'. Brandenburg: does not have a lot of experience with Gender Mainstreaming but has managed to make very good progress since 2000.

**Ireland:** Had difficulties with ensuring gender equalities in the past. In despite of all this, the ESF in Ireland is known to the gender expert as a country which has got a distinct approach on Gender Mainstreaming as a strategy to increase the female participation rate on the labour market.

**The Netherlands:** The ESF Netherlands has not got a very distinct approach on Gender Mainstreaming.

## **Focus**

A research must have clear boundaries, to make sure that it focuses only on answering the research questions and not make it unnecessary complicated with useless side paths. This research will be "fenced" geographically, thematically and in a time span. First, geographically, the research will focus on the mentioned member states<sup>6</sup>. Secondly, thematically, the focus lies only on Gender Mainstreaming and only in the European Social Fund (agencies). The sources will mainly be the products of these agencies, for instance, the Operational Programmes and annual evaluations. Finally, the time span; the programmes of the first funding period are allowed to receive funding for over two years after the end of the funding period. Still this research focuses only on the actual funding period from 2000 till 2006.

### **1.5.1 Operationalisation**

In order to make the most important concepts of this research explicit, the concepts: 'Gender', 'Mainstreaming' and 'Implementation', will be operationalized.

**Gender** refers to the socio-economic and cultural differences and interactions between women and men, which may vary from one population group to another and in time. Gender differs from sex which refers to the fixed, biological differences between women and men (Braithwaite 1999).

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<sup>6</sup> In the countries with a Federal system, Germany, the analysis will only be on 'Lander' level.

**Mainstreaming:** is that which is normal, standard, regular. In terms of equal opportunities and the European Social Funds it has a double meaning: it indicates that equality issues must be treated as a "standard" and "regular" part of programming. Furthermore it implies that equal opportunities must be treated not as a marginal and separate area of intervention, but as a normal and integral part of the design and implementation of all priorities and measures (Braithwaite 1999)

**Implementation:** decisions made in carrying out a policy (O'Toole & Montjoy, 1979:465)

## 1.6 Thesis structure

This research paper consists of four parts. The four parts are the following:

### *Introduction part*

In this part, consisting of chapter one, the gender equality policies within the European Union are introduced. Furthermore it explains Gender Mainstreaming, the European Social Fund and their objectives of reaching gender equality. It also presents the central research question and the aim and relevance of the research.

### *Theoretical part*

This part, consisting of the chapters two and three presents the theoretical background of the research. In the second chapter a broad view is given on Gender Mainstreaming; how did it originate and what is the current status. It focuses on the concept itself, how can it be defined? The third chapter narrows the theoretical perspective down to factors which influence the implementation and connect directly with the research question. It also states indicators where the empirical research is based upon.

### *Empirical part*

In the empirical part, the findings of the document analyses and interviews will be presented. The empirical part consists of chapter 5 gives and presents a direct report on the findings of the research according the indicators. It concludes with a cross-national comparison of the extend of success in implementing Gender Mainstreaming and the fostering and hindering factors in this process.

### *Concluding part*

In this part the conclusions and analyses of the literature and the three countries will be reflected. This part will also extract and mention the outcomes of the of Gender Mainstreaming in the ESF and presents the recommendations.

## **CHAPTER 2**

# DEFINING GENDER MAINSTREAMING

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Chapter II covers the basic concept of Gender Mainstreaming. It provides background information on the central topic and puts it in perspective. Different theories and opinions are being taken in to consideration in the process of fine tuning the concept.

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## **2. Gender Mainstreaming, a conceptual analysis**

Gender Mainstreaming itself, the content of the concept is pretty simple: incorporate the gender equality perspective in policies, at all levels and at all stages. Everybody understands the general idea, but no one understands what it requires in practice. The reason for this is that it is not just a policy which requires a onetime implementation; it demands a whole different view on policy-making. The vagueness around the output of GM makes it easy to transform it into just a political slogan and not really operationalize it. To put it in Mazey's words: "Gender Mainstreaming is a deceptively simple concept that is likely to be extremely difficult to operationalize" (Mazey, 2000: 343).

This chapter provides the theoretical background information on the research topic. It will put Gender Mainstreaming in its historical, statistical and theoretical perspective; it gives an insight in the history of gender relations, a global view on the current status on gender relations in Europe and furthermore it introduces gender mainstreaming as a concept.

### **2.1. Putting Gender Mainstreaming in perspective**

#### **2.1.1. Gender relations and Patriarchy**

Throughout history the perception on gender relations has been subjected to different thoughts. One of those thoughts holds the question: "when is gender equality reached?" Walby (1990:91) mentions two opposed interpretations of change in gender relations: one, that they are improving and two, that there is little overall change. These interpretations can also be applied on the thought on gender relations in the European Union. On one hand, there is the discussion that gender equality is not nearly reached when focusing on job segregation, gender pay gaps and decision-making positions for women. On the other hand, there is the conception that, for instance, in Scandinavian countries gender equality has been reached on the labour market, because of the large participation of women on the labour market, and in politics as well. The latter can also be approached as a misconception, as there is still segregation in jobs, where women work in the 'soft' and less paying sectors, here you can ask the critical question if this is what equality is or should be. Furthermore there is the trend that if women do manage to work in other sectors than for instance the 'soft' sectors, the reputation and wages of these jobs decrease.

As shown in statistics in the next paragraph, the amount of women in decision-making positions is very low. This means that still mostly men make decisions and develop policies for both men and women. The European society has been dominated by men for centuries. In sociological science, this form of society is called a patriarch society. A patriarch organised society implies that: "men take all

the power positions in all the important institutions of society and that women do not have access to these positions, however this does not mean women do not have any power, it just means that they do not have as much power as men"<sup>7</sup>. One of the reasons why women and men do not have equal powers in this patriarch society is because women have less institutional power; they have less control over developed policies. A logical consequence of policies developed exclusively by men is that the policies are based on the male norm of society and do not take the development of women into account. Gender Mainstreaming is now pointed out by policy makers as an efficient strategy to rectify this power imbalance.

There has been a point of significant change in gender relations in the 19<sup>th</sup> and 20<sup>th</sup> century (Walby, 1990:95). There are two reasons for this first change: first the capitalist demand for labour and second, because of feminist political activity. These changes gave women first, at the end of the 19<sup>th</sup> and the beginning of the 20<sup>th</sup> century: political citizenship, which not only brought them voting rights but also education, access to professions, property ownership and the right to leave marriages. New Zealand was the first country to allow women to participate in election in 1893. In 1906, Finland was the first European country where women were granted the right both to vote and to stand for election. At the time it was considered 'a great victory' and a 'miracle that has happened!' (Ramirez et al. 1997). Then secondly, in the 20<sup>th</sup> century women gained access to paid employment and with that also the actual ability to leave marriages. The first moment was primarily victory at political level of the state, the second at economic level and this provided the possibility for the mass of women taking advantage of their legal independence (Walby, 1990:96). With these victories in mind it is still not to be concluded that the European society has totally overcome the patriarch period. Women may have access to institutional power in theory, but in practice the powerful positions in institutions are not always easily accessible for women as shown in the following paragraph on the current statistics on gender relations in the European Union.

### **2.1.2 Statistics on gender inequality in the EU**

In the previous paragraph positive changes in gender relations were discussed. Looking at the present, we can conclude that in general the current position of women in the European Union is improving. Nevertheless, some major imbalances persist and do not seem to narrow down. This reveals that both opposed interpretations of Walby (1990), mentioned in the paragraph above, can be accurate at the same time. Let's take a look at some European statistics to find out where the change is and where it is not. In 2006, women account for just over 44% of all persons employed across the European Union. Interestingly, the five countries with the highest share of female workers all border the Baltic Sea- Estonia, Lithuania, Latvia, Finland, and Sweden. At the other side women account for the lowest share

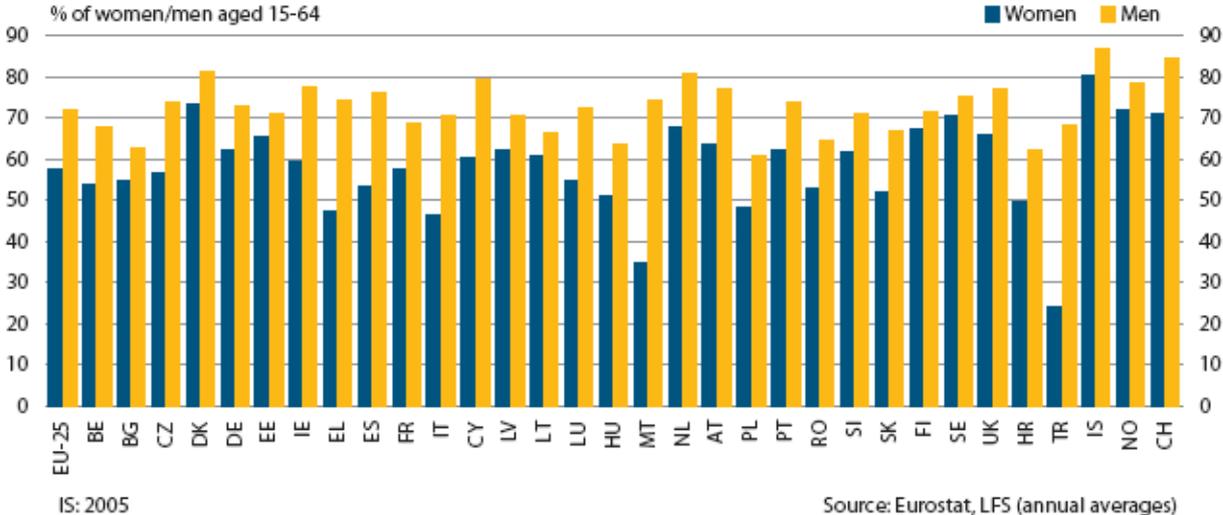
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<sup>7</sup> This definition is formulated by RoSa, a documentation centre, library and archive for equal chances, feminism and women studies. <http://www.rosadoc.be/site/nieuw/start.htm>

of employment in countries bordering the Mediterranean Sea-Spain (41%), Italy and Greece (both 39%), Malta (32%) and just 26% in Turkey (EC, 2007: Women and men in decision making). The female employment rate in the EU-25 rose to an average of 57 % in 2006 (Eurostat 2008:54). Against this favourable development, it must be acknowledged that the main areas of growth for female employment continued to be concentrated in activities and occupations already predominantly feminine, such as caretaking jobs. In this way the rising employment rate has only reinforced gender segregation on the labour market (EC: report on equality 2006:5).

Figure 1.

**Employment rate of women and men aged 15-64 in 2006**



In the EU-25 as a whole some 72 % of men aged 15-64 were in paid employment in 2006 as compared with just over 57 % of women in the same age group. But this does not give a complete picture. For instance, the Netherlands has an employment rate for women of almost 70% according to these statistics. However, these percentages include also women with small part-time jobs, which means that their jobs doesn't bring these women financial independence. The full-time labour participation of women in the Netherlands is only 41.7%, which is dramatically lower than the average of 57% in the EU-25 (Eurostat 2008) and not nearly reaching the Lisbon Target of 60% (EC: Gender Mainstreaming Website 1). Furthermore, women in the European Union earn on average 15% less than men for equivalent work, despite having better academic qualifications. Women account for at least 55% or more<sup>8</sup> of upper secondary qualifications. At university level women also make up for 55% of all enrolled students and their participation has increased largely over the recent years and is expecting to

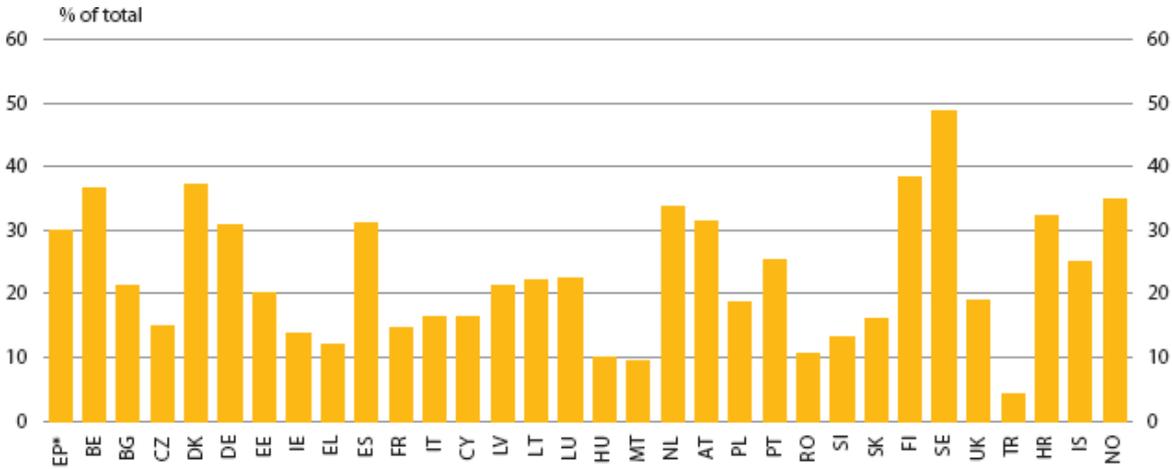
<sup>8</sup> The educational level of women differs per European member state.

continue growing. Moreover, in their tertiary (university) level studies, women seem to be more successful than men, as women make up for 59% of students graduating in EU-25. (Eurostat, 2008).

When we take a closer look at statistics on job segregation it reveals that women in the employment in the EU tend to be concentrated in a few sectors of activity. This concentration seems to be increasing rather than falling over time (Eurostat, 2008: 55). In the EU-25 in 2005, some 61 percent of women in employment worked in just six sectors of activity, moreover, all of these involved the supply of services. For men, the degree of concentration is much lower than for women. There is little sign of a longer-term tendency for gender gap to narrow. Indeed the difference between the proportion of men in employment working in computing jobs and the proportion of women is wider among young people than among the older generation. This difference is repeated to varying extends in all Member States (Eurostat, 2008:61). The vertical job segregation also shows in representation of women in key positions. The power and influence of women is still far below that of men (Eurostat 2008:67).

Figure 2.

**Women as share of members of parliament 2006**



EP= European Parliament Members  
 decision-making database

Source: EC women and men in  
 In Eurostat 2008

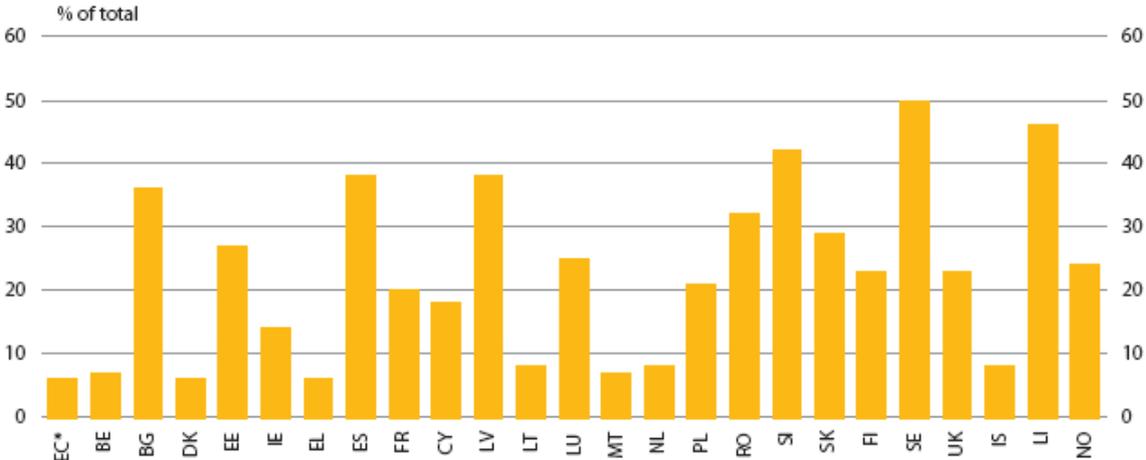
Sweden is the only country in the EU where women made up for almost half of the Members of Parliament. The gender composition of national parliaments is reflected in the representation of women in national governments. Only in Austria, women make up for half of senior ministers. In Spain, Sweden and Norway they accounted for half, reflecting a deliberate policy on gender balance. For the greater part of the member states the proportion of women was under 30% and 20% and even no female ministers in Cyprus (Eurostat, 2008:67-68).

Comparing this to the proportion of women employed in the European institutions, it mirrors the national situation. In 2006 only 29% of the Commissioners were women and only 30% of the European Parliament (Eurostat 2008:69). The gender imbalance is repeated among national civil servants. In 12 countries women held under 10% of the senior civil servants. In the Czech Republic, Germany, Italy, Hungary, Austria and Portugal women do not have any of those posts at all (Eurostat 2008:69).

The underrepresentation of women at the top in the private sector is heightened in big business where men account for nearly 90% of board members of leading companies and there has been little improvement over recent years (EC, 2007: women and men in decision-making).

Across the EU as a whole, average hourly earnings of women were on average, 15% below those of men in 2005. Moreover women earn less than men in all member states (Eurostat 2008:93). The structure of earnings survey (SES) provides a more detailed insight into the wage gap. For

Figure 3.  
**Women as share of senior civil servants 2006**



EC= European Commission (A1 officials) / CZ,DE, IT, HU, AT,PT,IR the share of women is zero

Source: Eurostat: women and men in decision making (2008)

example part of the explanation might lie in the fact that women are employed in different occupations than men or having been in the job for a shorter period. But even taken all these factors in account, still women have on average lower earnings than men in all age groups, at all education levels, in all occupations and irrespective of the length of service (Eurostat 2008:94).

To conclude briefly; women do still not nearly take in an equal part of the labour market, in terms of wages, top positions, and job segregation, while accounting for the larger part of the tertiary-level educated than men. As for decision making positions; the representation of women in European, national and local governments and institutions is somewhat disappointing as well.

## 2.2 The origin of Gender Mainstreaming

As mentioned before, Gender Mainstreaming (GM) is seen by the European Union as one of the most important solutions to overcome gender unequal relations in Europe. To deepen the introduction on GM, the matter of coming into being will be attended.

Gender Mainstreaming was first mentioned, as a concept, in 1995 at the United Nations fourth World Conference on Women in Beijing. At this conference the concept was introduced as a strategy in international gender policy and obliged all Member States to develop a concept for implementation of Gender Mainstreaming as part of their national strategy (UN, 1995: chapter II). Just a few years before, another political opportunity had taken place, in November 1993. At this time, the Maastricht Treaty came into entry, providing a major expansion of the power of the European Parliament. The EP had long acted as one of the primary advocates of a more forceful policy on women's issues. This political change therefore simplified the accession of Gender Mainstreaming into the European policies (Pollack & Hafner 2000).

Thus the GM concept was not only introduced and promoted by the United Nations; also the political climate in the European Union was right. Therefore in 1996, the European Commission also committed itself to the strategy of Gender Mainstreaming. The Communication from the EC, dated 21 February 1996, stated: *"incorporating Equal Opportunities for Women and Men into all Community policies and activities"* (EC, 1996). At the Treaty of Amsterdam in 1997, Gender Equality was also legally put in the heart of European Policy priorities. The Treaty of Amsterdam strengthens and focuses the European Union on Gender and extends the gender equality principle (article 141) beyond the workplace (Defeis 2000).

With this legal affirmation Gender Mainstreaming became Europe's new strategy to combat gender inequality. Under the GM concept all policy measures must constantly be monitored for their effects on the life situation of men and women, and if necessary, revised. Only this will lead to a full equality of sexes (Genderkompetenzzentrum 2008).

The European Commission defines Gender Mainstreaming in line with the Treaty of Amsterdam. This Treaty states that the incorporation of equality between men and women into all policies is no longer an option, it has become an obligation. A mainstreaming approach for equal opportunities must be introduced into all European Social Fund programming

To motivate the use of GM, the European Commission developed a checklist for the implementation of Gender Mainstreaming of employment policies (National Strategic Reference Framework, 2006).

The checklist consists of four steps:

1. **Getting organised:** The central focus in this first step is on implementation and organisation, and building awareness and ownership of the concept of Gender Mainstreaming.
2. **Learning about gender differences:** The aim of the second step is to describe gender inequality with regard to participation, resources, norms and values, and rights, and to evaluate trends without policy intervention.
3. **Assessing the policy impact:** The third step is to analyse the potential gender impact of the policy with reference to participation, resources, norms and values and rights.
4. **Redesigning policy:** The fourth step is to identify ways in which the policy could be redesigned to promote gender equality.

The problem with many of the familiar strategies to promote gender equality is, so it seems, that policy makers identify the problem of women's inequality as a labour market problem. Therefore they measure progress in terms of such factors as women's labour force participation (Bacchi, 1999:69). However there exist multiple factors why women do not participate in the labour market. By shifting attention from equality of treatment to equality of impact, mainstreaming seems to have the potential to engender policy-making that is to transform government and policy making as to take account of gender inequality (Beveridge et al. 2000).

## 2.3 Conceptual analysis

The aim of this conceptual analysis is to give insight to the meaning of a concept. In this paragraph conceptual analysis is made by analysing how it is been used in sentences and definitions. The different views of scholars and actors on gender mainstreaming are being unravelled, ending up in one definition for the concept. Finally the paragraph focuses on how progress of implementation of mainstreaming can be measured.

### 2.3.1. Different views on one concept

Gender mainstreaming is about learning to do things differently and to achieve gender equality, this much is clear, but is there a clear consensus on what the concept comes down to? The European Commission, the European Social Fund and the Community of Practice<sup>9</sup> (CoP) on Gender Mainstreaming, all use different definitions to describe one phenomenon. A result of this can be that policy makers implement different policies under the name of Gender Mainstreaming. Firstly, we will take a look at the definitions of Gender Mainstreaming used by the European Commission, the European Social Fund and the Community of Practice. Starting with the latter:

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<sup>9</sup> Community of Practice: a community founded to exchange best practices within agencies of the ESF in different Member States.

**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 levels and at all stages, by the actors normally involved in policymaking.” (Website CoP, Council of Europe 1998:13)

This definition focuses on the active mentality towards change that is needed for Gender Mainstreaming, but it leaves out the meaning of this change. In this definition Gender Mainstreaming is as a black box where you put (re) organisation, improvement, development and evaluation in, and a gender equality perspective incorporated in all policies comes out. This definition, used by the Community of Practice for Gender Mainstreaming, does not give an unambiguous idea of what implementation of the principle of Gender Mainstreaming means. The critical thing about this fact is that the Community of Practice is where Managing Authorities turn to, to get practical tips on (the implementation of) Gender Mainstreaming. If the definition here is unclear it is difficult to get an unmistakable idea of the principle in the first place.

European Commission: Unit on gender equality:

Gender mainstreaming is the integration of the gender perspective into every stage of policy processes – design, implementation, monitoring and evaluation – with a view to promoting equality between women and men. It means assessing how policies impact on the life and position of both women and men – and taking responsibility to re-address them if necessary. This is the way to make gender equality a concrete reality in the lives of women and men creating space for everyone within the organisations as well as in communities - to contribute to the process of articulating a shared vision of sustainable human development and translating it into reality. (website EC: gender equality)

This definition seems quite clear, as we can see; in contradiction to the definition of the Community of Practice, it does not treat the implementation process as a black box, it presents a clear explanation on what it means, what impact it has and what needs to be done to achieve it.

European Social Fund website:

ESF website: The gender-mainstreaming approach means that particular attention must be paid to equal opportunities in the programming and implementation of all ESF activities. Where possible, they support the promotion of women in employment and the elimination of pay differentials. Specific actions target women’s employment directly – for example, by concentrating on a particular group such as immigrant women or women entrepreneurs. As

well as promoting equal opportunities, the aim of this ESF priority is to support the Lisbon target of raising the average level of women's participation in the workforce to 60% by 2010.

This definition tends to promote special action for women. Whilst the European Union explains that Gender Mainstreaming does not contain specific actions for women. After all, the EU is following the so-called dual track: Gender Mainstreaming plus, separately, specific actions for women. One of the community programmes under the European Social Fund, EQUAL, published a guide on Gender Mainstreaming. This guide, funded by the European Social Fund, mentions the following on Gender Mainstreaming:

But as women and men do not start from the same position, equal treatment does not always lead to equal outcome (EQUAL guide on GM, 2004).

This could be read as the fact that unequal treatment will lead to equal outcome, which implies special actions for women. Although it does not mention it specifically, it is at least very confusing. In the end, Gender Mainstreaming does not specifically mean special actions for men or women. It is a different way of policymaking, considering outcomes for both sexes. Eventually this could mean that Gender Mainstreaming sometimes contains special actions for men and women. Finding clarification on this point, will be an important part to be found out in the empirical research.

Next to the fact that the Cop, ESF and the EC make use of different definitions, there is another problem according to Daly (2005), she mentions the fact that policymakers give their own meaning to gender mainstreaming. She identifies three varieties of gender mainstreaming. The first is an 'integrated approach. In this case gender equality is extended to most actors involved in public policy and is embedded across institutions in society. The second variant can be characterized as 'mainstreaming in the form of limited transversality'. In this context transversality means little more than the involvement of different government departments or ministries in the implementation of a plan or program on gender equality. In short, this variant is a nothing more than spreading out the responsibility for gender-related objectives. In the third scenario, gender mainstreaming is a highly fragmented attempt, assigned either to a small number of policy domains or to a specific program within a domain and disconnected from general governmental policy on gender (Daly 2005: 438). In this case, the first, that of the integrated approach would be the most effective one considering its broad implementation in society.

Maybe it is time to admit that Gender mainstreaming is simply a variable concept. Though this does not always help the implementation process, because of the elastic characteristic of mainstreaming, it's easy to make the claim to be mainstreaming (Daly 2005:439). When in fact it could be that the thing

policy makers are doing does not help to advance gender equality and can just as well be nothing more than a 'political' promise. The concept is promoted by the EU and a satisfying result, as for instance committing to it, is often tied to the allocation of funding. When committing to Gender Mainstreaming in Operational Programmes is a condition to receive funding, the promise to commit can maybe be made more easily than the actual implementation of it.

The somewhat vague and non-specific character of the concepts of mainstreaming has probably accelerated universal acceptance: everybody understands the general idea but no one is sure what it requires in practice (Beveridge and Nott 2002: 1).

Presuming gender mainstreaming is an elastic concept with a non-specific character, which can be committed to in several ways, the best thing to do to advance clarity around the concept is to make it as concrete and specific as possible.

To get back to the core of the concept: Gender Mainstreaming means doing things differently. Rees (1998) describes this as a complete rethinking of how inequality is underpinned in systems and structures. So we do know Gender Mainstreaming is especially grounded in a strategy of change, seeking to address gender inequalities by focusing effort on organizational culture, process and structures, especially those associated with policy-making (Daly : 2005:440).

Gender mainstreaming is a long term strategy designed to raise gender awareness in all policy areas, a process which can be expected to take decades if the outcome is to be a fundamental change in the embedded cultural values and in particular in the tradition of seeing all public policy, labour market policy in particular, through a male lens (Lombardo 1998: 7).

An important misconception on gender mainstreaming is that it is only for women made by women. But the systematic integration of a gender perspective in policies needs to be applied in a two-gender perspective. Men's rights have to be included, for example by facilitating men's rights and duties to care (Rubery 1998)

To come back to the question asked in the beginning of this paragraph; "is there a clear consensus on what the concept comes down to?" , the answer would be: no there is not. The broad potential of the concept is its advantage and its disadvantage at the same time. It can lead to the prioritization of gender equality on political agenda's of every policy field. On the other hand it can and does lead to misunderstanding on the part of policymakers and risks the fact of becoming an empty concept, which everybody can fill in at their own preferences.

Gender Mainstreaming is ownerless: no institution or body, national or international has any authority to determine which efforts to adopt mainstreaming policies are true as opposed to sham or misguided. Both the vagueness and the lack of ownership has made it easy for governments to embrace the mainstreaming concept and to adopt policy initiatives in its name (Beveridge and Nott 2002: 1).

In the worst case scenario Gender Mainstreaming is seen as a replacement for specific gender policies and structures. In the European Union, mainstreaming was first taken as a good excuse that specific funds and programs for women could disappear now as there was no need for it anymore (Lombardo 2005:414). In the specific case of the Structural Funds, it has also been used to further reduce incentives for gender equality (Rossili 2000). Two problems can derive from this. First, specific gender policies are still needed to make up for the arrears women have in their social and economic position. Secondly, looking at the conceptual analysis, if the concept it not been understood in the right way or people give their own meaning to it, the consequence could be that nothing happens.

## **Concluding**

To conclude in a very simple and short way: institutions and organizations use different definitions of Gender mainstreaming. Since Gender Mainstreaming tends to be a difficult concept in the first place, the different definitions make it even more difficult to draw one line of what effective use of gender mainstreaming is.

The two question asked at the beginning of this chapter can now be answered. 1. No there is no unambiguous perspective on GM within the research context. 2. GM is a long term strategy, but it is not simply, a goal in itself. There is a distinct difference between a process and its goal. The goal is eventually to reach an equality of impact. Next to the questions asked at the beginning of the paragraph there is another matter which has not been clarified. I am now referring to the question whether Gender Mainstreaming contains specific actions for women or if it does not. In chapter 1.2 it states that the COP's opinion about Gender Mainstreaming is that " it does not replace specific actions for women" and "the European Union follows the so-called dual track: Gender mainstreaming plus specific actions to advance women". One could understand from this statement that Gender Mainstreaming is not a specific action for women and that is why there are separate specific actions for women. The European Commission emphasizes on its website as well that Gender Mainstreaming is not a specific action for women. However on the website of the ESF, of which COP is a practical group, it says the following: "Where possible, they support the promotion of women in employment and the elimination of pay differentials. Specific actions target women's employment directly". Because of this direct contradiction between cooperating organisations I will clearly state in this

research how I see specific actions for women in the process of Gender Mainstreaming. To my opinion: Gender Mainstreaming does not necessarily mean specific actions for women, but in some cases, specific actions is a crucial part of the Gender Mainstreaming process, this can either be in an explicit or in a implicit way.

To sum up all the characteristics of GM addressed in this paragraph, an overview is given of what GM is and what it is not.

Table 1.

**The principle of Gender Mainstreaming**

<b>Does contain</b>	<b>Does not contain</b>
A long term strategy	Replacement for gender equality policies
Change in organizational culture, process and structures associated with policy-making	A goal in itself
Reaching equality of impact	
CAN contain specific actions for women	

**2.3.2. Definition**

Then finally coming to the definition. Taking into account all the different definitions and statements on how Gender Mainstreaming is a vague concept which can be interpreted however actors want. Since the important actors in this research use different definitions of the object of research, I have come up with a new definition which will be the one used in this thesis. To my opinion the definition should be simple and comprehensive and it should contain the objective.

To put it very simple and applicable, **Gender Mainstreaming in policy-making: "Verifying how men and women are affected differently by policy and if needed revising policy in order to create a more equal outcome"**

**2.4. When is gender mainstreaming implemented?**

Now that there is a definition, how do we know if the concept is implemented properly? Changing the focus, outcomes and budgets of policy making is not a very simple thing to do. A lot of commentators do not spell out in detail what a full implementation of Gender Mainstreaming would actually be (Carney, 2002). It is important for the progress of the concept to develop indicators to measure and evaluate Gender Mainstreaming. Jahan (1995) makes the important distinction between ends (gender equality) and means (gender mainstreaming), which are usually not clearly distinct. Both are necessary

and therefore two types of indicators are needed to measure Gender Mainstreaming implementation. One is to assess achievements of results, and a second to establish qualitative process and results on consultation, participation and empowerment (McGauran, 2005). Macdonald et al (1997) did already outline the progression an organization usually makes when adopting Gender Mainstreaming which can be summarized as follows:

- I. Gender is a good idea
- II. Gender is taken on board as a policy
- III. Gender is fully integrated into structures and practice

These procedures are very broad and can be specified into more levels. McGauran (2005:104) has added more specified levels to this process and thereby she mentions some indicators which can indicate that the concept of Gender Mainstreaming is implemented.

1. **Administrative adherence to commitments**, this includes the collection of gender disaggregated indicators and the incorporation of equal opportunities into project selection procedures. However, this runs the risk of becoming a formality without comprehensive monitoring.
2. **Mainstream engagement with the commitments**, this means mainstreaming bodies would be more proactive with commitments to promote gender equality. This could entail a number of different strategies for those bodies charged with implementing Gender Mainstreaming.
3. **Changes in mainstream budgets and policies**, addressing gender inequalities would require a movement beyond the precise commitments to a much wider analysis of structural gender inequalities and subsequent change in central policies and associated budget lines by government departments. At a broad level, changes might include childcare costs and flexible hours. Indicators would need to be worked out very specifically for each area of government policy.
4. **Changes in wider society**, it is likely as a result of changes in mainstream policies and budgets that changes will be evident in the representation of women and men in some of the main areas of wider society. For example, changes in women's role could contribute to more father taking up parental leave/ or working part time.

You could say, Gender Mainstreaming is implemented at point three and has eventually reached its objective at point four. However, these indicators are still not a very concrete way to measure whether Gender Mainstreaming is implemented or not, since the indicators are not operationalized. Moreover it focuses more on the outcomes than on real implementation in policy making.

A more practical tool to find out whether a policy has a positive or negative outcome is a Gender Impact Assessment (GIA). The EU-expert group on Gender and Employment EGGE published a report on Gender Impact Assessment and the European Employment Strategy (Verloo 2004). Now

GIA is one of the most developed instruments for Gender Mainstreaming (Verloo & Roggeband 1996). A GIA identifies positive or negative outcomes of proposed policies in terms of gender equality. GIA's are supposed to inform policy and decision makers in an early stage in order to enable them to reorient or mitigate policies if necessary. However this is not as much a tool to measure implementation of Gender Mainstreaming as it is something which if it is used is an indicator that the Gender Mainstreaming approach is integrated.

## **2.5. Conclusion**

The conclusion that can be drawn from this chapter is that Gender Mainstreaming is above all a complicated process. The confusion around the exact meaning of the concept can cause problems in the implementation process. Furthermore, there is not a lot of research and literature on how to measure the extent to which Gender Mainstreaming is implemented. Therefore at the end of the third chapter I will present a list of concrete indicators order to measure the extend of implementation of Gender Mainstreaming. This list will be based on the theory in chapter two and the implementation theories which will be addressed in the following chapter.

## CHAPTER 3

# FOSTERING AND HINDERING FACTORS

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**Chapter III** This chapter addresses implementation theories, approached from various sciences, such as (public) management, sociological and political. From these theories fostering and hindering factors for implementation processes will be abstracted and put into a checklist of fostering and hindering factors

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### **3. FOSTERING AND HINDERING FACTORS**

In very general terms, 'theory' is an explanation of what is going on in the situation that is investigated (Robson 2002: 61). The situation which is currently being investigated is the implementation of Gender Mainstreaming, this means that concepts that evolve around this and have influence on it, are important to address. In this chapter implementation theories are being addressed; the theory of the difficulties of converting public policy into appropriate action (Montjoy & O'Toole:1979:465). Since Public administration is a multi-disciplinary science, different perspectives on implementation will be addressed; the (public) management, the sociological and the political perspective.

To build a conceptual framework around the research topic; Gender Mainstreaming, some earlier work by feminist scholars that sought to incorporate gender into mainstream approaches to public policy will be analysed. The past decades have shown an increasing interest of feminist scholars from various disciplines in public policy analysis of the importance of gender as a relevant dimension. What are the views of these scholars on different implementation strategies and what to keep in mind when mainstreaming gender into policies? Unfortunately, the perfect implementation theory which will guide every policy through this difficult process simply does not exist.

This chapter approaches theories from broad to specific. Therefore, first I attend the matter of legal adoption of European policy and the gap between 'formal' and 'practical' implementation. The second paragraph addresses organizational implementation theories and the changing of existing organization routines. Paragraph 3.3 explains the importance of involving multiple actors in the implementation process. Paragraph 3.4 is on the importance of mainstreaming new norms, and paragraph 3.5 takes a closer look on norms and existing frameworks from a sociological perspective. This chapter concludes with an overview of indicators to measure whether Gender Mainstreaming is implemented and an overview and checklist of all the Fostering and Hindering factors which have been addressed in this chapter. The empirical research will be based on this checklist.

#### **3.1. Gap between 'formal' and 'practical' implementation**

Where member states adopt the Gender Mainstreaming policy in their legal structure and where ESF agencies adopt concepts in their Operational Programmes, does not necessarily mean it is also being applied. Versluis (2007) calls the latter step of implementation; the practical 'street-level' implementation. In this research I make a difference between 'formal' implementation and 'practical' implementation. Formal implementation means: setting the policy as a goal in a programming period and formally register the topic. Practical implementation is setting up necessary resources, change, tools and instruments, monitoring and inspection by regulators (Versluis 2007). This research focuses on formal and practical implementation and it would therefore be interesting to see whether there exists a gap between the legal or programmed application and the practical implementation. The responsible authority to monitor this process in this case is the European Commission. According to

Article 211 and 226<sup>10</sup> the Commission, together with the Court of Justice is responsible for ensuring the proper implementation of EU legislation in all Member States. The Commission also has a task in directly overseeing application of European legislation in specific policy fields. What exactly member states have to implement depends on the type of rule which is issued (Versluis 2007). However, in sectors as employment and gender mainstreaming, the role of the EU is primarily that of mediator for ideas, since the EC works with directives in these policy field In that case, the Commission acts as facilitator of voluntary, cross-national policy transfer (Mazey 2002). This also means that the extend of implemented policies has no consequences for future subsidies.

A case research conducted by Versluis (2007:64) between four different member states on implementation of European policies, concludes that practical implementation should require more of the Commission's attention. When directives are 'only' transposed into national legislation, while they are not applied in practice, the usefulness of legislation becomes questionable.

This observation is comparable with the case of Gender Mainstreaming within the European Social Fund. Although Gender Mainstreaming is not obliged by a directive, it is one of the guidelines to integrate Gender Mainstreaming in the Operational Programme in order to receive funding, which makes it an obligation. However there are no real consequences should it only be mentioned in the Operational Programme but not be implemented in the ESF Managing Authority. In this case 'practical' implementation would mean, not only to consider the concept of Gender Mainstreaming in ESF's Operational programmes but also in broad policy-making perspective and project building.

When in this research 'implementation' is mentioned, the 'formal as well as the 'practical' form of implementation is meant unless indicated otherwise.

### **3.2. Intra-organizational implementation**

Governmental policies are usually implemented by organisations; this is why it is useful to conceptualize implementation as an organizational issue. When implementing new policies different problems can arise. Montjoy and O'Toole mention two things which can occur: first, when a new mandate is assigned to an established agency (in this case an ESF agency) the new patterns of acquired activity may compete with old ones. Intra-organizational problems can result from this. Second; many mandates require the participation of more than one agency and thus create situations where the traditional institutional tools are not controlled by a single actor. Because of this inter-organizational problems can occur (Montjoy & O'Toole 1979: 465).

Because the research focuses mainly on the implementation process within ESF agencies, the intra-organizational implementation will be further enlightened. Montjoy and O'Toole (1979:466) mention two organizational sources of constraints which can hinder implementation: the set of external

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<sup>10</sup> Treaty Establishing the European Community, TEC

mandates or authority and the set of existing routines which need to be changed in case of new activity. Routines are useful for efficient performance, but they lead to inflexibility since they are costly to change. Organizations who want change need resources sufficient to the task, for instance, they need money, staff, and expert knowledge of the new routine, time and authority. The conclusion you can draw from this is; change comes with costs. In many cases, agencies may not have these resources and this can be a constraining factor. So the amount of resources necessary for the organization change has, among other factors, an effect on success of the implementation.

Now we take a look at the characteristics of the external mandate as this has influence on the success as well. Montjoy and O'Toole use two characteristics of mandates: one; their specificity and two; the amount of new resources they need. These characteristics lead to the following four possible combinations:

Figure 4.

**Characteristics of Mandates**

**Description of expected activity:**

		<b>Vague</b>	<b>Specific</b>
<b>Provision of new resources:</b>	<b>Yes</b>	<b>A</b>	<b>B</b>
	<b>No</b>	<b>C</b>	<b>D</b>

Source: Montjoy & O'Toole (1979:466)

The question now, of course, is what is the most effective combination with the least constraints? Let's take a look at the different characteristics / types and how they can help organizations to overcome the constraints of existing routines. The first one, type A, vague and with new resources, this could provide more leeway than specific mandates and new resources could help organizations overcome the constraints of existing routines. In reality, the absence of a clear purpose on the part of leadership, the opportunity to direct agency activity would be passed on to other actors. Type B, specific and with new resources, these new resources are an opportunity for organizational change.

But this change will presumably be tightly governed by a specific external directive. Therefore, it can be expected that organizations provided with a type B mandate will establish new routines for prescribed behaviour. In the absence of real inter-organizational or impact problems, implementation should be relatively effective. In the case of type C, vague and without resources the statement allows room for interpretation, but the organization is restrained by its own routines. Because of the absence of new resources, there is little chance that there will be a voluntary change. Of course it is possible that an external directive applies sanctions to the agency, but then again the sanctions need a degree of specificity, which is contradictory with the C type: vague. At last, type D, specific and without resources. This type should be the one with both the constraints of existing routines, as well as the specific policy statement. On the other hand; existing routines can usually be justified in terms of official purposes and new mandate may be in competition with old mandates. The situation is different when the organization is not unanimous in its support of existing routines. In this case an external mandate can be used as a resource. Moreover, it is usually used as a resource by the dominant, powerful groups using the external mandate as an excuse and say: "They are forcing us to do this" (Montjoy & O'Toole 1979:467).

From the perspective of the authors the surest way to avoid intra-organizational problems with policy implementation is to establish a specific mandate and provide new and sufficient resources. Therefore the best option would be mandate B. The advantage of this mandate above others seems to be that new activity was directed toward an externally specified goal. The best way to ensure a proper administration would even be to create a new unit to handle a type B mandate.

As mentioned in the introduction of this paragraph, a perfect implementation theory does not exist and also organizations differ. Furthermore, a significant critical aspect of mandate B is first of all the fact that new resources are required. This is often exactly the problem agencies have; new resources are difficult to come by. Secondly, there is a possibility that if the description of the expected activity is too specific, resistance will arise within an agency.

### **3.3. Involving multiple actors**

According to Braithwaite (1999) a key factor of success in integrating Gender Mainstreaming into Structural Funds, is a broad participation of actors. Gender Mainstreaming is a political process as well as a technical one. Therefore the participation of a wide range of social actors, including women, within this process is very important (Clavero, 2005). Several gender experts have listed this as a success factor (Pollack & Hafner-Burton 2000, Mazey 2000). Beveridge et al. (2000) also recognize this important factor in their theoretical guidance on how the success of mainstreaming initiative is to be judged. Therefore they developed the participatory-democratic model. In their opinion mainstreaming is to be transformative and therefore has to address four issues:

1. Mainstreaming must enhance the inclusion and participation of women in the decision making process and, in particular, reduce or eliminate gendered barriers to inclusion and participation.
2. Mainstreaming needs the existence of open policy-making processes, which privilege consultation with a range of women's organisations and interests.
3. It is important to generate and disseminate gender-segregated data. Without this data, assumptions are often made which can prove to be very counterproductive.
4. Mainstreaming strategies must address the practical requirements for effective implementation of mainstreaming. Currently there are two strategy approaches:
  - a. The **expert-bureaucratic model** (in which experts and specialists are the key actors).
  - b. The **participatory-democratic model** (in which an extensive range of actors are involved)

The tendency to date for Gender Mainstreaming has been to focus on the use of analytical techniques rather than paying attention to participative techniques.

According to Beveridge et al (2000), only the participatory-democratic model can achieve the transformative potential claimed for Gender mainstreaming. This model encourages a range of individuals and organisations to contribute to gender impact assessments. It promotes participation and access to policy-making and emphasizes the accountability of experts and officials. The expert-bureaucratic model presumes that assessing gender impact is regarded as a task to be performed by specialists. Those specialists may be gender experts with specialized training. To summarize: specialist are important for the transformative process, but the participation of an extensive range of actors is a premise for success.

"When policies are worked out *for* rather than *with* a politically excluded constituency, they are unlikely to engage with all relevant concerns".

A. Philips 1995:13

However, the most effective choice for making Gender Mainstreaming everyone's business would probably be a combination of the two models. Eventually the task needs to be performed by policy-makers, but with assistance of and in cooperation with specialists and gender experts. Not only for their expertise and up-to-date knowledge but also to motivate policy-makers to keep making an effort in advancing Gender Mainstreaming.

In this research the objective is to find out what the success factors are in the process of implementing Gender Mainstreaming. Therefore it is inevitable to pay attention to and be able to recognize certain Gender Mainstreaming strategies.

Next to the fact that the principle of Gender Mainstreaming involves multiple actors and disciplines it is also a typical example of a strategy that involves multiple levels in governance as well as multiple shifts in governance. Multiple levels because it involves not only national and regional state institutions, but also institutions in science and economics. The implementation of the principle of Gender Mainstreaming involves multiple shifts in governance, because of the strategy which aims at a reorganisation of policy processes and at a shift in responsibilities. The strategy of Gender Mainstreaming aims at a multiplication of the actors, policy areas and policy levels that are involved in working towards gender equality (Verloo 2004:2).

### **3.4. Feminist approach**

In the preceding chapters a lot of attention was drawn to the Gender Mainstreaming in total so far, now it is time to take a closer look at the Mainstreaming part specifically. Paragraph 1.2 already mentioned mainstream as that is what is normal and standard, but how do we translate this into a process of incorporating gender into the heart of policy making processes?

Rounaq Jahan (1996: 828) makes a distinction between an integrationist and an agenda-setting approach of mainstreaming. In his article on mainstreaming in the context of 'gender and development' she tries to convince policy makers to instead of trying to fit gender issues into every sector they should move towards agenda-setting. This means that policies and measures should more clearly address the women's agenda. This agenda setting approach demands a lot of changes in decision-making procedures and processes, starting with a change in leadership. Jahan (1996: 829) mentions the importance of a proactive role for women. Women who are affected by policy or by organisations need to participate in decision-making structures, which will need to be made democratic and participatory.

More scholars have emphasized the importance of the representation of women in elected assemblies and decision-making structures. A number of feminist political scientists have conducted research on this topic, not only to highlight the under representation of women but also to establish empirically whether the presence of women representatives makes a difference to policy outcomes and the nature of the policy-making process. The results of these studies suggest that on some policy issues, gender rather than class or party is important in determining the views of elected representatives. Moreover, these findings support the view that increased representation and participation of women is a necessary, though not necessarily sufficient, prerequisite of an effective gender-mainstreaming strategy (Beveridge, Nott & Stephen in: Mazey 2000:337)

A new communication strategy is needed to facilitate the expansion of the support for women's movements. Up to now, promoting the gender issue has been perceived as a win/lose scenario: women's gain has been seen as men's losses. This should change into communicating a win/win message: changing gender roles benefits women, men, families and communities.

There must be evidence that the mainstreaming political agenda has been reoriented by rethinking and rearticulating policy ends and means from a gender perspective.

The reason that scholars such as Jahan (1996) but also Mazey (2000) are skeptical about the possibility of integrating women's issues into theoretical policy frameworks is that they are of the opinion that in the theoretical framework, the ostensibly 'gender neutral' norms and institutions are implicitly male and/or privilege masculine values and interests. The key (methodological) question in this debate is 'can women and gender issues simply be incorporated into existing explanatory frameworks as another variable' (Mazey, 2000: 331-335).

### **3.5 Sociological institutionalism**

The scepticism of Jahan (1996) and Mazey (2000) about the possibility to incorporate gender issues into existing frameworks because of the existence of deeply embedded masculine values and interests in institutions which has been concluded in the previous paragraph will now be addressed from a sociological perspective.

Before gender 'neutral' norms could have a chance, change is needed. The two variants of 'new institutionalism' in political science give insight in processes of change and in what is needed for change: first, the rational choice institutionalism and second, the sociological (or constructivist) institutionalism. From the rationalist perspective following the "logic of consequences" the changes necessary to implement Gender Mainstreaming and to (re) design policy in such a way that it reaches an equal outcome for men and women would provide political actors with new opportunities and constraints to pursue their interests.

*"People act, observe the consequences of their action, make inference about those consequences, and draw implications for future action. The process is adaptively rational. If the information is accurate, the goals clear and unchanging, and the environment stable, the process will result in improvement over time" (March & Olsen 1975).*

The sociological or constructivist approach emphasizes a 'logic of appropriateness' and processes of persuasion (Radaelli 2003). The ideas explained earlier clearly fit the logic of appropriateness: the idea that change occurs through a socialization and collective learning process. The logic of appropriateness is a perspective on how human action is to be interpreted. Action, policy making included, is seen as driven by rules of appropriate or exemplary behavior, organized into institutions. March and Olsen (1998) believe that rules are followed because they are seen as natural, rightful, expected, and legitimate. Actors seek to fulfill the obligations in a role, an identity, and the ethos, practices and expectations of its institutions. Embedded in a social collectivity, they do what they see as appropriate for themselves in a specific type of situation (March & Olsen 1998: 3).

According to Radealli (2003) two mediating factors influence the degree to which change results into the adoption of new norms and the development of new identities. First, change agents or norm entrepreneurs, who can mobilize in the domestic context and persuade others to redefine their interests and identities. Secondly, a political culture and other informal institutions which promote consensus-building and cost-sharing.

As has been addressed in paragraph 2.1.2, currently there exists wide acknowledgement of the fact that gender roles and relationships between men and women are socially constructed and reflect and reinforce deeply embedded norms and assumptions regarding male and female roles. More specific the view on gender roles within post-war Western Europe was that of the breadwinner model; the woman as a mother and the man as head of the household and breadwinner. The life of the women was in private sphere, whereas the men's life was in public sphere. These assumptions influence all aspects of social and political behaviour and sustain far-reaching political and socio-economic inequalities. In the context of policy making these assumptions are known as 'policy frames' based upon particular norms and values which will help to define the policy problem as well as the possible solutions (Mazey, 2000:336).

Ole Elgstrom's study on gender mainstreaming of EU development policies provides important new insights into the way in which new norms are actually constructed during the policy making process. According to Elgstrom (2000:472) the sociological or constructivist approach is correct in its prognosis that the expansion of a norm may be difficult to stop once it has gained an organizational platform, but it underestimates the force of resistance and inertia in organizational settings. The resistance to new policy frames is an integral part of the policy-making process. Elgstrom also emphasizes the importance of the role played by 'norm entrepreneurs' in promoting and diffusing new norms such as in gender neutral policies. These 'norm entrepreneurs', a network of national and EU gender experts, can function as teachers and as guardians of the new norms. This way, in the early phase of the EU-decision making process gender equality is ensured and clearly established in the ensuing solution. Norm persuasion can hereby be combined with strategic bargaining to overcome resistance and in institutionalizing new norms (Elgstrom 2000:473).

### **3.6. Fostering factors for implementation**

Taking the implementation theories above in account, some conclusions can be drawn. In this chapter a lot of hindering factors and pitfalls of GM have been addressed. But also the success factors of GM and conditions for effective implementation have been pointed out. The following list of fostering factors is drawn from the implementation theories in this chapter. It is needless to say the opposite of the fostering factors are considered hindering factors.

#### **Fostering factors:**

1. Being prepared for intra- and inter- organizational problems as a result of new patterns competing with the old ones: focus on changing existing routines as it can lead to inflexibility when introducing a new activity such as Gender Mainstreaming. Change occurs through a socialization and collective learning process.
2. Being prepared for intra- and inter- organizational problems as a result of new patterns competing with the old ones.
3. 'Norm entrepreneurs': promote new norms and overcome resistance and inertia towards the new norms (such a gender neutral norms). Gender roles and relationships between men and women are socially constructed and reinforce deeply embedded norms and assumptions regarding male and female roles, change can therefore create resistance.
4. Change needs resources: availability of resources: material, time and knowledge is a precondition.
5. A specific description of expected activity: new activity should being directed toward an well-specified goal in order to diminish 'lipservice' and empty political slogans.
6. Create a new unit to handle the new activity with a specific mandate: in order to show the agency is well-committed and to support staff with implementing GM in their own work
7. Broad participation of actors: encourage participation and access for everyone to policy making. A combination of the expert-bureaucratic and the participatory-democratic model would involve the most actors and will create the most cooperation
8. A new communication strategy: a women's gain is not a men's loss, communicate the win-win scenario for both men and women
9. Consultation and cooperation of policy-makers with gender-experts and women's organizations
10. Political support and a sympathetic policy frame: national and regional political support, or governing parties which put gender equality high on their political agenda.
11. The European Commission's attention and motivation of the practical implementation of policies: the European Commission supplying organisations with processes of argumentation and motivation as well as political pressure
12. Practical tools such as Gender Impact Assessment (GIA) and checklists

### **3.7 OLAR fostering factors checklist**

In order to operationalize the fostering factors in the preceding list, I have used the existing Gender Mainstreaming checklist developed by the European Commission (see paragraph 2.2) en placed the fostering factors under the four phases of the checklist. By positioning the operationalized factors in these phases, it puts them in the right context of the implementation process. By putting the factors in question form, the checklist van be used as a tool to check whether fostering factors are present. The

phases are Organizing, Learning, Assessing and Redesigning (OLAR). First the objective of the separate phases are being explained and applied, followed by the OLAR checklist.

1. **Organising:** is the preparation phase, the phase where the road gets cleared for gender mainstreaming. Consisting of a political basis, a broad management support, support of womens organizations etc, European commission support and pressure, resources (people and money)
2. **Learning:** is learning about the current status on gender inequality within the relevant environment. Finding and analysing the pitfalls, awareness of what is going on.
3. **Assessing:** assessing policies and their (potential) gender impact.
4. **(Re)designing:** The fourth step is to identify ways in which the policy could be (re)designed to reach a more gender equal outcome. The street-level step of the implementation process.

Figure 5.

### OLAR Checklist

#### 1. Organising

- Is there a broad participation of actors involved?
- Is the organization prepared for intra- and inter- organizational problems as a result of new patterns competing with the old ones?
- Is there National / Regional political support or can it be lobbied for?
- Is there active support from the European Commission?
- Are resources available in terms of money, people, time and knowledge?
- Has a new unit been created to handle the new activity with a specific mandate?
- Is there a specific description of expected activity?

#### 2. Learning

- Are gender experts and / or women's organizations being consulted?
- Is there attention for culture / norm changing?
- Is there a new communication strategy informing people on the win-win situation of gender mainstreaming?

#### 3. Assessing

- Has the potential negative impact of the project on men or women been considered (e.e place extra burden on one group)?
- Is there a discrepancy between 'formal' and 'practical' implementation?

#### 4. (Re)designing

- Are policy-making structures, policies and budgets redesigned and ready for GM?
- Who will implement the planned projects? Are these partners gender competent?

### **3.8. Indicators implementation process**

In order to measure what the fostering and hindering factors in the implementation process of Gender Mainstreaming are, it is necessary to first determine when Gender Mainstreaming is implemented. At the end of chapter two, the question was asked: when is Gender Mainstreaming implemented? From the conceptual analysis in chapter 2 and an analysis of implementation theories in this chapter, I have composed a list of indicators which can indicate whether Gender Mainstreaming is implemented:

1. Is there a concrete and unambiguous perspective of Gender Mainstreaming in the OP? - throughout the organization? The implementation starts with an ESF Agency committing itself to the concept itself in its Operational Programme and an understanding of the concept throughout the organization.
2. Are data and indicators gender desegregated? In order for the ESF to consider equality, the data, which programmes are based upon and the participants information must be gender desegregated.
3. Does the goal of policy /projects reflects the needs of both men and women?
4. Do planned activities involve both men and women?
5. Have stereotyping and other structural barriers (practical, cultural, altitudinal, institutional, economic) preventing full participation of women or men have been considered?
6. Are the consequences of the potential projects effects being considered for men and women?
7. Are the implementing bodies gender trained?
8. Are gender impact assessments (GIA) being performed?
9. Is the mainstreaming of gender policies addressed in evaluations?

The more ESF agencies have integrated preceding indicators the better Gender Mainstreaming can be considered implemented. Based on these indicators the extend, to which Gender Mainstreaming is implemented in the three cases, will be presented in the next chapter.

### **3.9. Conclusion**

The conclusion that can be drawn from this chapter is that many different factors influence the implementation process of GM. Not only organizational and public management factors should be kept into account, but also organizational and political. Furthermore, in order to find out what the fostering factors are, first should be determined whether GM is implemented. In the next chapter the list of indicators to measure the implementation of GM and the OLAR checklist will be applied on the three cases in order to find out to what extend GM is implemented and what in practice fostering factors are.

## CHAPTER 4

# RESEARCH FINDINGS

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**Chapter 4** This chapter presents the research results of the document analysis and the interviews. All three paragraphs attend an ESF Office in Brandenburg, the Netherlands and Ireland. First the extent to which Gender Mainstreaming is implemented will be addressed, followed by the most fostering and hindering factors in this implementation process. The chapter ends with a cross-country comparison in implementation of the concept and fostering and hindering factors.

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## 4. Research findings

With this chapter, the empirical part of the research starts. Three ESF offices in three different countries have been the subject of research on to what extent they have implemented the principle of Gender Mainstreaming and what the most fostering and hindering factors were in the implementation process in the three ESF offices. The offices are all in Western- European countries with comparable backgrounds on gender equality issues. Brandenburg has a slightly different background because of its recent communist history where men as well as women were all participated in the labour market. Ireland and the Netherlands are both counties which are late developers regarding gender equality. More in-depth background information the countries and region can be found in appendix II.

The chapter is divided into four paragraphs; the first three each address an ESF organization, the extent to which they implemented GM and the fostering and hindering factors in this process. The fourth paragraph presents a cross-national comparison on the implementation of GM and the fostering and hindering factors, to end in a conclusion.

### 4.1 ESF Brandenburg

Interviews took place with Ms. Langhoff, policy-maker and responsible for GM and with Dr. Dieter Wagner from the University of Potsdam; chair of human resources and leader of the ESF project ‘Mentoring for Women’ which focuses on decreasing the female brain drain in Brandenburg.

#### 4.1.1. To what extend is Gender Mainstreaming implemented?

Table 2.

	<b>Gender Mainstreaming implementation indicator</b>	<b>Present</b>	<b>Comments</b>
<b>1</b>	Is there a concrete and unambiguous perspective of Gender Mainstreaming in the OP? - throughout the organization?	+ -	
<b>2</b>	Are all data and indicators gender desegregated?	+ -	Partially
<b>3</b>	Does the goal of all policy /projects reflects the needs of both men and women equally?	+ -	Objectives have not been met
<b>4</b>	Do all planned activities (projects) involve both men and women equally?	-	
<b>5</b>	Have stereotyping and other structural barriers (practical, cultural, altitudinal, institutional, economic) preventing full participation of women or men have been considered?	-	
<b>6</b>	Are the consequences of the potential of all projects effects being considered for men and women equally	+ -	

7	Are gender impact assessments (GIA) being performed?	-	
8	Are the members of staff gender trained? Are implementing bodies gender trained?	+ -	
9	Is the mainstreaming of gender policies addressed in evaluations?	+ -	

The Brandenburg OP mentions GM as the strategy to achieve gender equality. It is being explained multiple times and not only mentioned at the chapter for Equal Opportunities but also at other thematic priorities. However GM is being explained as a labour market approach only to increase the participation of women at the labour market as an important incentive for the development of the economy. The policy maker states that the understanding of the concept of GM was very low and appeared to be difficult to transfer to practical daily work due to its abstract character. Although training was given, it has not reached a point where everybody in the organization knew what GM was and how to apply it in daily work.

The only concrete gender desegregated target concerns the amount of women participating in projects. Furthermore: whilst the project of the Potsdam University supports women really well in finding a job it seems to be more a specific action for women rather than gender mainstreaming, as the project leader says: “projects which specifically aim at meeting demands of women are being funded”. Although the project leader sees his project as an example of GM. The gender competence of implementing bodies is not always available; trainings on GM are not obliged and there are no financial sanctions if GM is not being implemented. However, it is the case since 2005 that applications who don't contain any goals concerning gender equality are not being accepted.

The monitoring system registers all defined indicators with reference to gender (jobs, participants). These results, of ESF support proof that women are being considered according to their share of the target group (e.g. share of female unemployed as part of the total unemployed). On the other hand, the evaluations mention that some allocation of funding even maintains the unequal balances between men and women. According to the end evaluation, later in the funding period there is more progress, however the results of the funding of equalization have been disappointing.

The end evaluation mentions that integration of the equalization concept has made some progress since the midterm evaluation. The evaluation of the results of the funding of equalization has however been disappointing. The ESF has clearly not reached its set objectives with regard to the participation of women in projects, not even half of the objective has been fulfilled (40,9%). Furthermore, the ESF does not seem to contribute to a funding/social security to an increase of the employment of women.

The output of the ESF is not clearly measurable but the basic assumption in the evaluation is that the unequal position of men and women would be worse if it was not for the input of the ESF instruments.

According to the midterm evaluation, the consideration of the gender mainstream approach in the programme implementation and monitoring as well as in the authorization of grants is only rudimentarily achieved. I agree with the midterm evaluation that GM is quite well- implemented in the OP in the sense that it has been explained and addressed at multiple thematic priorities, but in practice it is not taken into account when developing policies and projects. Furthermore, although GM is addressed there is no strategy on how to achieve it which makes it a limited commitment.

#### **4.1.2. Fostering and hindering factors**

##### **Organising**

- Is the organization prepared for intra- and inter- organizational problems as a result of patterns competing with the old ones?
- Is there National / Regional political support or can it be lobbied for?
- Is there active support from the European Commission (EC)?
- Are resources cleared in terms of money, people, time and knowledge?
- Has a new unit been created to handle the new activity with a specific mandate?
- Is there a specific description of expected activity?

According to the policy maker, the organization was not very well prepared for this new policy, however in 2003 the ESF became a separate agency from the Ministry. The more autonomous status had as a consequence that there were less inter-organizational problems. She also mentions an important change set in when a new government was elected in 2004 (SPD/CDU), which obliged regional governments to use GM, after this, people understood it was important and it became an important topic on the political agenda. She considers the political support of governing parties as one of the most important fostering factors of GM because it creates willingness to implement. The same counts for the support of the EC, at the moment the EC supports the concept, but not actively. Policy makers would like for the EC to put more pressure on GM by setting concrete targets within a certain time frame for ESF organizations in all Member States and organize more meetings where people can exchange best practices. According to the policy maker, GM was not well received within the ESF Brandenburg organization, mainly because staff members saw it as an extra burden and there were too little resources (in terms of people and knowledge) to implement an entirely new policy. Also the project leader of the project ‘Mentoring for women’ complains about the fact that there are too little resources (in terms of money) in order to involve more participants. The OP does not contain specific (financial) resources for GM, since it is considered a part of the priority: Equal Opportunities. The policy maker states that if there would have been more resources, in terms of people working on GM, it would have been a fostering factor, but GM was a very unpopular topic and actually nobody wanted

to get involved in the topic. In 2005, a new department was set up, specifically aimed at GM and controlling. This department was outside of the ESF, but inside the Ministry. This gave more importance to the concept and more people were involved and available to support staff members wherever needed.

The specific description of expected activity appeared to be a very important factor for GM in Brandenburg. Without a clear understanding on the concept and on how to work with it, it simply does not have a chance at being applied properly. In the OP of Brandenburg the situation on GM is outlined as following: with the high professional orientation and professional participation of women, Brandenburg has resources which are an important potential of the development of its economy. The better integration of women into professional life is pursued as a cross-section goal. In order to reach this cross-section goal, the previous funding projects are being further empowered and developed both quantitatively and qualitatively. In accordance with the joint funding concept and adapted in the National action plan, the strategy to be used to achieve this goal will be GM.

The policy maker complains that the concept is abstract and although the concept is being explained in the OP, there is no explanation of how the concept should be applied. I can conclude that because the measures of the OP are far from concrete, it makes it difficult to measure whether goals are achieved since it does not have many clear –cut targets or a detailed explanation of expected activity. It keeps you in a state of wondering what they are going to do exactly.

An example of GM in the OP is given as follows; projects which specifically aim at meeting of demands of women are being funded. Thus, although Brandenburg explains and addresses GM in their OP at several occasions, there is still not a clear perspective on it, since the concept of GM is also explained as specific action for women. Because of the poor understanding of the concept, the policy maker developed a GM checklist for programme developers, containing quantitative and qualitative questions to guide them through the mainstreaming process. The most important thing according to the policy maker is to make the concept comprehensible while doing so.

According to project leader, there is just very little interest for gender equality, especially in the conservative academic world. The interest in GM is even less due to its lack of concreteness. He also states that GM is a paper commitment: “for several years it has been a routine to write a few lines on GM in the project application form just because you are obliged to, but we don’t really do anything with it, [..]now we are gender mainstreaming in the core with our mentoring project for women. Better understanding of GM will come with time, especially in the science environment”.

## Learning

Are gender experts and / or women’s organizations being consulted?

Is there attention for culture / norm changing?

Is there a new communication strategy informing people on the win-win situation of gender mainstreaming

Therefore, in Brandenburg there are little women's organizations and if they are there, they have little resources. As much as they would like to encourage these organizations to develop programmes, the ESF cannot seem to motivate them to take initiative. There was some help of external experts in the way that experts have written a report on GM and that they invite gender experts into the workgroups every now and then. There is not one gender expert fixed involved with programme and policy making. The policy maker states that necessary norm changing was motivated by working with concrete examples and very practical goals as well as by giving practical examples about day-to-day life situations. But probably the most important thing was to motivate people to work with GM. The ESF Brandenburg tries to communicate the win-win situation of GM, in 2004 there was a demographic turning point. More and more high qualified women left, and Brandenburg understood that something had to happen to keep educated women in Brandenburg. Then is a good time to tell people about the win-win situation of GM.

### Assessing

- Has the potential negative impact of the project on men or women been considered (e.e place extra burden on one group)?
- Is there a discrepancy between 'formal' and 'practical' implementation?

The potential negative impacts of projects have not been considered in Brandenburg. The policy maker mentions that although GM was put in the OP to achieve more gender equal outcomes and policies, in practice it was very difficult to enthusiast people. Also she found it very difficult to operationalise and it took a lot of effort to transfer it into day-to-day work. The project leader already mentioned the 'paper commitment' by filling in some lines on GM, just because you are obliged to, which suggests a discrepancy between formal and practical implementation at project level. As for the ESF organization level; in the OP there was quite a lot of attention for GM, but from the evaluations it became clear that the implementation had been disappointing and the policy maker complains there is no interest at all in GM within the ESF.

### Redesigning

- Is there a broad participation of actors involved?
- Are policy-making structures, policies and budgets redesigned and ready for GM?
- Who will implement the planned projects? Are these partners gender competent?

The policy maker mentioned that the fact that she was the only one in the organization which was concerned with GM, did not progress the implementation at all. According to her, it is very important that everyone is involved in order for every staff member can apply GM on their work. Now she was

the only one who was responsible and nobody else was interested in it. In terms of redesigning, there was a new department for GM developed, but in terms of policy structures, it basically stayed the same. A new policy was introduced in 2005, which obliged applicants to incorporate gender equality goals in their application form, otherwise the project was not accepted. However, the end evaluation mentions that only 34.4% of the participants are women. The implementing bodies are getting more and more gender trained. The ESF finances trainings for implementing partners, however they have to organize them their selves. The trainings are not obliged and also not very popular, although this increased after the obligation of incorporating gender equality goals in application forms.

**What were the most fostering and hindering factors?**

According to the policy maker the name Gender Mainstreaming has, until now, not proven itself very effective. It is not comprehensible and it is impossible to translate in German. In Germany it is being translated as positive actions for women but this is not the same. Because of the difficulty of word and process, Gender Mainstreaming is simply not being accepted. This has been the most hindering factor for the implementation process of Gender Mainstreaming. The EC should first have thought about what they realistically wanted to achieve and then come up with a clear, comprehensive and interpretable concept. The second most important hindering factor has been the fact that there was only one policy maker concerned with GM. According to the policy maker, the most fostering factor was the understanding of the importance of GM of society as a whole as a consequence of political support. Other fostering factors which were not present, but mentioned by the policy maker as fostering factors are; concretization, concrete and measurable goals and a strong top-down management and commitment from the top.

**4.2 ESF the Netherlands**

Interviews took place with Ms. Vrugink, policy-maker and responsible for GM, Ms. Ruygrok (consultancy: Bureau E-quality), external gender expert assisting the ESF and with Ms. Van der Horst, (Centre for Gender & Diversity Maastricht) gender expert and project leader of several ESF projects concerning increasing participation of women in science.

**4.2.1 To what extend is Gender Mainstreaming implemented?**

Table 3.

	<b>Gender Mainstreaming implementation indicator</b>	<b>Present</b>	<b>Comments</b>
<b>1</b>	Is there a concrete and unambiguous perspective of Gender Mainstreaming in the OP? - throughout the organization?	-- --	

2	Are all data and indicators gender desegregated?	+ -	
3	Does the goal of all policy /projects reflects the needs of both men and women equally?	-	
4	Do all planned activities (projects) involve both men and women equally?	-	
5	Have stereotyping and other structural barriers (practical, cultural, altitudinal, institutional, economic) preventing full participation of women or men have been considered?	-	
6	Are the consequences of the potential of all projects effects being considered for men and women equally	-	
7	Are the members of staff gender trained? Are implementing bodies gender trained?	+ - + -	
8	Are gender impact assessments (GIA) being performed?	-	
9	Is the mainstreaming of gender policies addressed in evaluations?	--	

In the programming document the 'Enig Programmeringsdocument Europees Sociaal Fonds Doelstelling 3. Periode 2000-2006' is rather little programme explanation on equal opportunities. It starts basically with a SWOT analysis of the priorities, where one of them is Equal opportunities. In the Dutch OP as a whole, GM is mentioned on two occasions. After summing up its funding period priorities, the OP mentions:

Integrate the gender aspect when applying the planned programme. Make sure of a solid evaluation based on adequate systems en methods of data collection

The second time the concept is being mentioned is under the horizontal themes, one of it is: equal opportunities for men and women. Two pages are dedicated to this priorities but it only lightly touches the current situation of women in education and on the labour market. It does not mention any planned activities or programmes / projects to support this objective. At the end of the paragraph there are a few lines on GM. It mentions the following; "the core of the current emancipation policy is the integration of the quality brand emancipation in the regular policy".

Subsequently, the OP mentions that the choice of the Dutch government to position emancipation in the mainstream is more than 'a paper commitment'. Via monitoring of development and results, the government should be kept committed. GM is not being explained anywhere as a concept nor is there an operationalized approach on how equality policies will be mainstreamed. Moreover the concept is written as 'gender mainstreaming'.

There are two other matters in the OP that don't explicitly mention gender mainstreaming but are clear signs of the use of the concept.

- National significant measures: in both national significant measures (activating labour market policy and lifelong learning) women and men will be reached equally through measures realized with ESF resources.
- Gender segregated data of project participants as well as the indicators project are based upon.

Next to the OP, gender experts developed a document which is meant to function as a guide book on how to deal with GM and a very concrete explanation and examples of thinking "gender mainstreamed".

An important sentence in the beginning of the midterm evaluation triggers questions. It states: "the regulations mentions a few preferences for certain target groups or application of instruments, but the ESF agency does not check on this matter. For the horizontal themes as 'gender (mainstreaming)', 'local development' and 'IT' does also count that presence and / or implementation of this themes do not play any role in authorizing the project or subsidy applies". What is actually being said with this statement is, there are certain measures but it is absolutely not necessary to follow them since there are no consequences.

On request of the European Commission an extra midterm evaluation question has been included.

"To which extent does the Dutch ESF fulfill the horizontal objectives or thematic priorities which are attached to the ESF funding period". One of the horizontal themes is GM, this makes it an interesting extra midterm question for this research.

The answer to this extra midterm questions is that thematic priorities are unknown to applicants and implementing bodies; "for the applicants and implementing bodies of projects, there is a lack of attention for the three thematic priorities ('gender', 'IT' and 'local development')". The reasons for this lack of attention are:

- There are no explicit objectives in the Dutch OP regarding the three thematic priorities;
- The 'Agency' does not have or want an active role in managing content of ESF projects.

The ESF OP does not mention any explicit equal opportunities objectives, but somehow in the midterm evaluation there is mentioning of the fact that the Dutch policy is known for its equal opportunities mainstream policy. However there is no explanation why the Dutch are well-known for their mainstream policies and it is not reflected in the attention for the concept. The conclusion on developed projects in order to motivate equal opportunities is that thematic projects are not being motivated by the ESF. Whenever there was a project developed on equal opportunities it was a single initiative from the applying organization and not from the ESF itself.

After the midterm evaluation, in 2004, the thematic priorities (ICT, Gender, Regional policy) are being made part of the application papers for projects. This in order to make applicants aware of these matters. The larger part of the project applicants (76%) indicates that none of the three thematic priorities are implemented in the projects. Only 19% of the project applicants states it has incorporated equal opportunities in its project, remarkable is that in most of these cases the division of men/women was 80/20 which makes you wonder where they have incorporated the equal opportunities aspect.

The end evaluation presents some statistics on the results of the funding period. As for female project participation; 85% of the project made a division between male/female participants and the division men/ women is 70/30%. The evaluation also set some explicit objectives: the employment of women should be 57% in 2005 and 60% in 2010, according to the Lisbon goals. There is no mentioning however, on how this objective is going to be achieved.

The policy maker states that the concept of GM was mentioned on the form for project application but was not necessarily actively motivated or obliged in any way. No concrete goals on gender equality or GM were set. According to the policy maker this is because it was no priority for the ESF. Furthermore they did not want to be held accountable. The same is for the evaluations where there is no attention at all for GM. According to the ESF policy maker Gender Mainstreaming is not applied in all ESF policies. It was put aside in a special corner with the gender experts and the equal opportunity policy makers and nobody else interfered. It is nothing more than a paper commitment. According to the gender expert; there was such a lack of attention and motivation. It was just a separate group of gender experts trying to work with it, but it was not broadly implemented or mainstreamed at all: “as for the ESF organization nothing has changed since the introduction of GM and it is just not implemented”.

Gender Mainstreaming is not well-integrated in the OP, the concept is hardly mentioned in the OP, let alone applied. There aren't any targets or measurable goals explicitly for GM. In the evaluations, GM is not addressed anywhere. There are some paragraphs on equal opportunities but the conclusion from these evaluations is rather negative. From the interviews Gender Mainstreaming appears to be a complex concept to implement in policy-making and also only 19% from the project applicants even states it incorporated equal opportunities. It remains unclear if this means these 19% are also use the principle of GM.

#### **4.2.2 Fostering and hindering factors**

##### **Organising**

- Is the organization prepared for intra- and inter- organizational problems as a result of patterns competing with the old ones?
- Is there National / Regional political support or can it be lobbied for?
- Is there active support from the European Commission?
- Are resources cleared in terms of money, people, time and knowledge?
- Has a new unit been created to handle the new activity with a specific mandate?
- Is there a specific description of expected activity?

According to the policy maker, GM was not received with a lot of interest within the organization. Hardly anything changed, so there were no organizational problems. After the negative midterm evaluation, some things changed. Research was conducted on what went wrong, there was an obliged training for everyone and applicants for subsidies were obliged to fill in a question on GM on the application form. The gender expert mentions that it was not that people were unwilling to work with GM, there was just no attention for it and people were never confronted with any consequences. This also meant that applicants still received funding if they filled in on their application form that their project did not keep into account the GM concept. An important positive change for GM came with the appointment of a State Secretary of Emancipation which gave it a motivation boost and freed up more financial resources. Both the gender expert and the policy maker find the support of the EC disappointing. One of the reasons why the ESF NL does not consider GM as an important concept, is because it does not get this message from the EC. If the EC really finds it important they should be more critical and firm, now there are no real consequences for the Netherlands if GM is not being implemented.

The gender expert mentions that, in terms of resources, knowledge was available; workshops on GM and a specific item on the ESF website. No specific budget was available it was out of the budget for Technical Support. No unit has been created to handle the new activity.

According to all three interviewed people, the lack of understanding and a description of specific activity was one of the most hindering factors. The concept was not clearly explained and operationalized in the OP and this reflected in the organization. According to the policy maker, it was difficult to introduce GM in the ESF organization. They started with gender desegregated data but the concept was not broadly introduced and it had nothing to do with mainstreaming. Everything was very non-committal and kept very general. Due to this lack of concretization people were not aware of what it really was. The gender expert agrees and states that people had no idea what GM was and the project applicants had no idea how to assess this. And it did not matter anyway because it was not checked and so they were never confronted with it again. The management top understood what GM was and tried to communicate this but the effort was minimal. According to the project leader, the local project leaders needed a lot of training to get through this difficult concept. The difficulty also lies in keeping the local project leaders on the mainstreaming path, because GM was mostly understood as only positive actions for women.

## **Learning**

Are gender experts and / or women's organizations being consulted?

Is there attention for culture / norm changing?

Is there a new communication strategy informing people on the win-win situation of gender mainstreaming

The policy maker confirmed that gender experts were involved. Bureau E-quality was involved in the technical team and supported with trainings and brochures. However these experts only supported gender equality projects, while GM should be implemented in every project. The gender expert shares this opinion and states that this approach was wrong; at the equality project they already address women's issues. The gender experts should be involved in all the other thematic priorities, like education, agriculture, asylum seekers, and work groups in order to explain how GM can be implemented in these priorities. Women's organization were not involved. Both the gender expert and the policy maker state that there is no change within the ESF organization and therefore also no attention for norm changing. There was some change on project level; project applicants could get a training and the application form changed. The project leader mentions that the only effective change is when the whole policy structure is being renewed, since it is difficult to implement an entirely new policy approach in existing policy frames. She also emphasizes the importance of communicating a win-win strategy by addressing a well known Dutch problem: the waste of female academic talent and the money it costs society every year. If this would be communicated in the right way, GM could be seen as effective solution instead of an complex, abstract concept.

### Assessing

- Has the potential negative impact of the project on men or women been considered (e.e place extra burden on one group)?
- Is there a discrepancy between 'formal' and 'practical' implementation?

The potential negative impact of project on men or women has not been considered. All three interviewed mentioned the fact that in the case of the Dutch ESF there was a discrepancy between formal and practical implementation. The gender expert spoke of a 'paper commitment' and the policy maker mentioned that should you want a concept implemented, you should hold people accountable to what they put on paper, otherwise nothing happens in practice. Both agreed that GM was not implemented at all in the ESF agency.

### Redesigning

- Is there a broad participation of actors involved?
- Are policy-making structures, policies and budgets redesigned and ready for GM?
- Who will implement the planned projects? Are these partners gender competent?

According to both the policy maker and the gender expert, there was no broad participation at all, and this was one of the factors why the concept of GM was not implemented. Only a separate club of gender experts and gender equality policy makers were concerned with this and in the rest of the

organization nobody knew anything about it or even what it really was. No policy making structures, policies or budgets were redesigned. There were only some changes at project level, but only at imitative of the project applicants. Implementing bodies could apply for GM training but not all bodies applied for this training. The end evaluation mentions that eventually only 19% of the project applicants mentioned that they had incorporated equal opportunities in their project, which does not even mean they used GM.

**What were the most fostering and hindering factors?**

The first important hindering factor has been the lack of commitment, there is no real commitment made to GM in the OP. Secondly there were some measures taken (training and extra questions in the application form) after the negative midterm evaluation, but if people did not take the training, or filled in on the application form that gender equality was not incorporated there were no consequences, this was even a commitment in the midterm report. In practice all three interviewed people mention as an important hindering factor first the difficulty of the concept; it is unexplainable and too complex. The lack of a concrete description of expected activity means people don't do anything with it. Both the policy-maker and the gender expert propose to revise the concept and rename it. Fostering factors are, according to the policy maker political support, as it raised the idea of importance of the concept. Other important motivating factors which were not present are according to the gender expert, Gender Impact Assessments for every project and more project guidance as regards content. Furthermore; attach consequences, no funding for projects who don't gender mainstream. For the project leader it was; communicating the win-win strategy with as example the waste of female talent and a strong commitment and willingness from the top and a strong top-down management, a broad implementation (not only in the equality department) and develop new policy structures as it is difficult to mainstream a new policy in existing policy structures.

**4.3 ESF Ireland**

Interviews took place with Mr. Landers, head of unit and policy-maker at the ESF, Ms. McGauran (Policy institute Trinity College Dublin) gender expert and head of the ESF Co-founded Gender Mainstreaming unit and Ms. Moreau (Ministry of Justice, Equality and Law Reform), project leader of several ESF funded projects.

**4.3.1. To what extend is Gender Mainstreaming implemented?**

Table 4.

	<b>Gender Mainstreaming implementation indicator</b>	<b>Present</b>	<b>Comments</b>
<b>1</b>	Is there a concrete and unambiguous perspective of Gender		

	Mainstreaming in the OP? - throughout the organization?	++ +-	
2	Are all data and indicators gender desegregated?	+	
3	Does the goal of all policy /projects reflects the needs of both men and women equally?	+	
4	Do all planned activities (projects) involve both men and women equally?	+	
5	Have stereotyping and other structural barriers (practical, cultural, altitudinal, institutional, economic) preventing full participation of women or men have been considered?	+-	
6	Are the consequences of the potential of all projects effects being considered for men and women equally?	-	
7	Are the members of staff gender trained? Are implementing bodies gender trained?	+ +	
8	Are gender impact assessments (GIA) being performed?	++	
9	Is the mainstreaming of gender policies addressed in evaluations?	+	

In the Irish OP, Gender Mainstreaming is a separate paragraph under the first chapter: expected Operational Programme outputs. In the introduction of the OP the evaluations of the previous funding period (1993-1999) are being attended. Among the points which followed from the evaluation report is the key focus on women returning to the labour market after having children:

the skill development needs of women returners should be a key focus with provision geared to meeting their needs (e.g. part-time courses, childcare support, etc.). Any remaining barriers to women's participation on courses and in other measures which aim to re-integrate women should be removed.

On the paragraph 'learning from the evaluations', GM is mentioned as a solution for early mentioned key focus point: "The commitment to gender mainstreaming in the Programme will accelerate the removal of any remaining structural impediments to women's equality in the access routes to the labour market".

The second chapter of the OP is dedicated to the context of the Programme, wherein the four themes are being clarified and which concrete commitments they contain. Under the theme gender equality two commitments are outlined, namely:

- Commitment to Gender Mainstreaming in the ESF 2000-2006
- Commitment to childcare

Furthermore, in the policies of the Irish ESF, equality of opportunity for women and men plays an integral role, through the dual strategies of mainstreaming and developing specific actions targeted at women. The policy concentrates on strengthening equal opportunities between women and men, in particular to ask attention for the significance of gender equality to the economy. The emphasis in the equality expenditure lies on activities to monitor and document progress on gender mainstreaming as well as on measures to support the development of an effective childcare strategy and provision. Gender Impact Assessments became an obliged part of project application in 2000.

Gender mainstreaming is well-integrated in the Operational Programme, it contained the following measures:

- ✓ To adopt a comprehensive gender-mainstreaming approach including measure components to tackle gender employment gaps and monitoring of progress through adequate data collection
- ✓ Implementation and evaluation Programme level indicators and evaluation indicators all focused on gender desegregated data
- ✓ The rationale for Gender Mainstreaming is to internalise an equal opportunities dimension into all actions under this and all other operational programmes under the National Development Plan in line with EU and government aims.
- ✓ An Educational Equality Initiative will provide support for education groups to address gaps in provision for educationally disadvantaged women, men and specific marginalised groups.
- ✓ All substantive measures (both EU co-funded and non co-funded) will, in principle, offer a specific gender dimension and suitable indicators will be available to measure progress in that respect.
- ✓ One of the explicit programme objectives is: to adopt a comprehensive gender-mainstreaming approach, including measure components to tackle gender employment gaps, and monitoring of progress through adequate data collection
- ✓ Gender mainstreaming is mentioned (next to local in initiatives and information society) as a horizontal policy. Also within the North-South cooperation the focus lies on: sharing or exchanging particular education and/or training experience (or, for example, OP management, audit, gender mainstreaming, local projects).

According to the evaluations, the ESF made important commitments to gender mainstreaming and has raised the profile of gender equality issues in policy formation and implementation. The ESF has funded investments in the area of childcare, promoting equality of opportunity between men and women in the labour market. The impact on the wider equality grounds is likely to have been weaker. As part of the commitment to gender mainstreaming the ESF states that it will be mandatory to include

equal opportunities among the project selection criteria for all Measures. However, a significant number of measures failed to deliver on commitments on gender mainstreaming actions. Furthermore, the lack of impact indicators and data make it impossible to measure the effects of the efforts made. The data on participants show that there are still considerable gender gaps favouring men. As part of the gender mainstreaming approach within the ESF there is a commitment to achieving gender balance on monitoring committees. However, the evaluation tells us that such balance is far from being achieved.

As for the OP and the evaluation, GM is well-integrated; there is attention for explaining the concepts as well as a strategy on how to implement the concept. In practice, although the opinions of the interviewed people differ on some matters, they all agree that Gender Mainstreaming is well-implemented in the Irish ESF.

**4.3.2. Fostering and Hindering factors**

**Organising**

- Is the organization prepared for intra- and inter- organizational problems as a result of patterns competing with the old ones?
- Is there National / Regional political support or can it be lobbied for?
- Is there active support from the European Commission (EC)?
- Are resources cleared in terms of money, people, time and knowledge?
- Has a new unit been created to handle the new activity with a specific mandate?
- Is there a specific description of expected activity?

According to the policy maker and the gender expert, the ESF staff member were already used to look at gender issues, thus GM was well received in Ireland and it did not need a lot of organizational change. Both the policy maker and the gender expert say that the commitment of the Irish government has motivated the implementation of GM. The Irish government takes the Lisbon target of a female employment rate of 60% very serious and considers GM a strategy to achieve these goals. Therefore there was willingness of the staff members to implement. The project leader mentioned that in march 2000, the Government officially approved Guidelines on gender impact assessment to mainstream equal opportunities between women and men across all areas of the National Development Plan (the ESF is part of this plan) 2000-2006. The policy maker and the project leader experienced the support of the EC as very helpful. They used their documents on GM and their policy papers as a support to work with the concept. The gender expert however, finds that the EC should put more pressure on the concept and that the EC monitoring committee should ask more, and more critical questions on how GM is really implemented. In the previous funding period there was more pressure from the EC to

implement everything that they had committed to and that worked out really well. There was no specific budget for GM, although it is addressed in the OP: As for the operational part, equality is being mainstreamed at programme level by including equal opportunities among the project selection criteria for all measures and equality will feature as a requirement in all evaluations to be undertaken under the ESF. The direct support provision for gender equality in this OP will therefore be supplemented by the commitment to introduce gender GM across all measures. The overall level of resourcing of gender equality across the ESF will therefore be significantly higher than the direct Equality funding measures in the OP.

Furthermore there was a lot of knowledge available, which brings us the next factor, the creation of a new unit. In 2000 a specific unit for GM was developed. It was also explained in the OP as follows: The OP must take account of subsequent impacts on both men and women; to assist this, the Equal Opportunities Promotion measure provides for the creation of an Equal Opportunities Promotion and Monitoring Unit in the Department of Justice, Equality and Law Reform. The Unit, which will be cofounded by the ESF, will carry out a wide range of functions including:

- advice on gender indicators and gender impact assessment of all measures (including provision of gender-disaggregated data)
- organisation of training workshops
- research
- provision of expert inputs to the CSF Equal Opportunities and Social Inclusion Co-ordination Committee and to the Monitoring Committees.

The Irish OP incorporated some practical ideas on how to implement GM into the organization, Furthermore there were a lot of document, prepared by the GM Unit, on how to use GM in specific situations. For example there is a step-to-step sheet on how to select projects which incorporate GM in their project plans. The sheet even warns you for project plans who are only committed on paper and it gives examples as: vague descriptions, such a ‘no discrimination’ and unsubstantial ‘good intentions’. The gender expert states that a lot of people did not have a clue what it meant, because it is such a strange term: “the word mainstreaming does not really mean anything at all in English”. Not everybody understood the concept and expected activity, but the Unit for GM had extra attention for staff member who didn’t. Besides the regular training the GM unit worked one on one with staff members to try to explain how to apply GM on the policy they were working on, which worked much better than general trainings.

## **Learning**

- Are gender experts and / or women’s organizations being consulted?
- Is there attention for culture / norm changing?
- Is there a new communication strategy informing people on the win-win situation of gender mainstreaming

Gender experts were consulted and involved in many stages of implementation; research, development of supporting documents, trainings, one on one support. They were also not only involved in gender equality projects but also in other thematic priorities. Both the policy maker and the project leader said people were willing to work with GM in the ESF office and programmes and therefore norm changing may not have been really necessary. However the gender expert says that although people were already used to look at gender differences in projects and policies, people were definitely not overjoyed with a new gender exercise. But also in this case the one on one training motivated them really well.

The Irish policy maker explains the relative success of the Irish implementation of GM also by its early adoption of GM and long interest for equality measures but most of all because GM was appointed by the Irish government to increase women participation and with that solve the labour market shortage. So GM was promoted as tool to solve an existing and broad social and economic problem, therefore people what it is and that it works. This is a good example of communicating the win-win scenario.

### **Assessing**

- Has the potential negative impact of the project on men or women been considered (e.e place extra burden on one group)?
- Is there a discrepancy between 'formal' and 'practical' implementation?

The potential negative impact has not explicitly been considered. According to the gender expert the general problem was that there was no attention for specific outcomes, and project leaders were not asked for specific outcomes. There is not a distinct discrepancy between 'formal' and 'practical' implementation. From the interviews I can conclude that basically the matters that have been addressed in the OP have been implemented in the organization.

### **Redesigning**

- Is there a broad participation of actors?
- Are policy-making structures, policies and budgets redesigned and ready for GM?
- Who will implement the planned projects? Are these partners gender competent?

According to the policy maker there were a lot of actors involved. Not only were departments and other ministries involved, also social partners have been consulted. Furthermore, within the ESF also policy makers from other thematic areas were involved, such as agriculture and entrepreneurship.

The policy maker mentions that already before 2000 the ESF Ireland had gender projects and had specific budget to fund projects concerned with gender equality and mainstreaming equality. The gender experts gives an example of changing policy; were there were organized English classes for immigrant couples. Since in some cultures women were not allowed to go alone. Furthermore in terms of project selection, a redesigned GIA form was made part of the project complement and they were asked to collect gender desegregated data. This worked out really well since it motivated people to think about different impacts of project for men and men. Because of the GIA and gender desegregated data collection and the support they were offered, some of the implementing bodies were gender competent, although it differed per thematic area.

### **What were the most fostering and hindering factors?**

An important fostering factor in Ireland has been the commitment to GM. Firstly GM was well-integrated into the OP and the evaluations. Secondly the creation of a GM unit was commitment as well and thirdly there was commitment from the Irish Government who saw GM as a strategy to overcome the Irish labour market shortages and to achieve the Lisbon goals. Also in practice; according to the policy maker the most fostering factors were a strong commitment to gender equality and the benefit of approaching GM as a solution for concrete problems, like the labour market shortage and the waste of talent of high skilled women. The gender expert mentions political commitment and pressure and the understanding of the society of the necessity of GM as a fostering factor. According to her, the most hindering factor is the abstract and incomprehensible character of the concept and she proposes to rename the concept, as in Ireland they also call it ‘Gender Proof’ and people understand this better, since particularly the word mainstreaming is clearly incomprehensible.

## **4.4 Cross-country comparison**

### **4.4.1. To what extend is Gender Mainstreaming implemented?**

Table 5.

	<b>Gender Mainstreaming implementation indicator</b>	<b>BB</b>	<b>NL</b>	<b>IRL</b>
<b>1</b>	Is there a concrete and unambiguous perspective of Gender Mainstreaming in the OP? - throughout the organization?	+ -	- - - -	+ +
<b>2</b>	Are all data and indicators gender desegregated?	+ -	+ -	+
<b>3</b>	Does the goal of all policy /projects reflects the needs of both men and women equally?	+ -	-	+
<b>4</b>	Do all planned activities (projects) involve both men and women equally?	-	-	+

5	Have stereotyping and other structural barriers (practical, cultural, altitudinal, institutional, economic) preventing full participation of women or men have been considered?	-	-	+ -
6	Are the consequences of the potential of all projects effects being considered for men and women equally	-	-	+ -
7	Are the members of staff gender trained? Are implementing bodies gender trained?	+ -	+ -	+
8	Are gender impact assessments (GIA) being performed?	-	-	++
9	Is the mainstreaming of gender policies addressed in evaluations?	+ -	--	+

From the GM indicators we can see that in Ireland, GM is well-implemented. In Brandenburg, effort has been made, but GM is not well-implemented, although Brandenburg addressed GM in its OP, it stayed very abstract. The Netherlands did not commit itself to the concept on paper nor in practice and the conclusion is that GM is not implemented at all in this ESF agency. In practice, only according to the Irish ESF policy-maker and gender expert and project leader GM is implemented. According to the Dutch it is not implemented at all and according to the policy maker in Brandenburg the concept is not-well implemented. The three offices have a different way of approaching GM. Ireland approaches it as a solution to an economical problem. But if the problem is solved or has disappeared otherwise, will GM still be an important policy? The Dutch approach it more as a social inclusion policy, and emphasize the social position of women. Brandenburg does both, it emphasized the social position of women and tries to use to decrease the female brain drain in Brandenburg.

#### 4.4.2 Fostering factors

Table 6.

<b>Fostering factor</b>	<b>BB</b>	<b>NL</b>	<b>IRL</b>
Preparation of organization for intra- and inter-organizational problems			
National / Regional political support	<b>P +</b>	<b>P +</b>	<b>P +</b>
Active support from the European Commission	+	+	
Available resources in terms of money, people and knowledge	+	+	<b>P</b>
A new created unit to handle the new activity	<b>P +</b>		<b>P +</b>
A specific description of expected activity	+	+	<b>P +</b>
Involvement and consultation of gender experts and women's organizations	+	<b>P +</b>	<b>P +</b>
Attention for culture and norm changing	+	+	<b>P+</b>
A new communication strategy to inform people on the win-win strategy of GM	<b>P +</b>	+	<b>P +</b>
Considering the potential negative outcome on men or women			

A broad participation of actors	+	+	<b>P +</b>
Redesigning policy-making structures, policies and budgets		+	<b>P +</b>
Gender competent implementing bodies	+	+	<b>P +</b>

P = present factor

+ = considered a fostering factor

## Organising

None of the organization were particularly prepared for organizational problems; it was not mentioned as a factor in the OP's nor was it indicated as a problem in the evaluations.

The national and regional support appeared to be one of the most influencing factors. Seven out of eight interviewed people indicated that political support significantly promoted the implementation process of GM. This varies from a change of regional government with a more pro gender policy than the previous one to the commitment of the National government to the Lisbon goals. In this matter the active support of the EC is also seen as big motivating factor. All interviewed people agreed upon this and even six out of eight asked for a more active role of the EC in motivating the GM policies. Firstly because the EC is taken very seriously by the (Irish and Brandenburger )ESF policy makers, secondly because they have a seat in monitoring committee and thirdly because they are responsible for the allocation of European funding.

The availability of resources differed per ESF office, whereas Ireland had spent a lot of money and time in the implementation, Brandenburg and the Netherland said that there were not nearly enough resources to make sure GM was well-implemented. The choice to set up a new unit goes together with making available resources. According to the interviewed people in Ireland the GM Unit was a very important factor in their success, also because it showed staff members the commitment to GM. In Brandenburg a small GM unit was set up, which helped to spread GM throughout the organization. The Netherlands did not create a specific unit for GM. Seven out of eight interviewed complained that the concept was not concrete and incomprehensible and that because of this it becomes almost impossible to implement it. Political attention and putting the topic high on the political agenda changed played a big part in motivating GM in all ESF agencies, by making it a more important topic and changed the ideas about it among staff member as well as society as a whole. In the OP's from the Dutch and the Brandenburger ESF there was no clear description of expected activities, it was exactly the opposite, everything was kept as general as possible so that they also could not be held responsible. The Irish mentioned more specific activities to gender mainstream. However in the interviews specifically gender experts mentioned that the best way to explain the expected activity is to sit with people one on one and explain how they can apply GM in their work, since that is the most specific you can get.

## **Learning**

The Netherlands and Ireland included gender experts in their policy-making. Brandenburg only involved gender experts in writing research reports and invited them every once and a while in their GM working group to explain GM in a more practical way. In Ireland women's organizations and social partners were consulted and involved. Brandenburg would like to involve women's organizations, but the women's organizations are not well organized and haven't taken any initiatives to work together with the ESF. No attention or strategies at all in the OP's on how to change the norm structures of staff member, whilst GM is such a different way of policy-making than the existing policies. However interviewed people indicated they tried to change norms with trainings, but that major norm changing came with the changing opinion of society. All three ESF offices indicated that communicating the win-win perspective is very important. Ireland is doing this by using GM to solve a concrete economical problem and so the society can see the positive effect of GM. While the Netherlands also has a concrete problem with the waste of female talent by educating women and subsequently not participate them fully at the labour market, they have not communicated GM as a 'solution'. Also Brandenburg has trouble communicating this win-win perspective, people there think it GM is purely about positive discrimination and that this has a negative effect on men on the labour market. The larger part of the data and indicators of all ESF offices are gender desegregated. This is one of the few things that is clearly mentioned in all the OP's.

## **Assessing**

There is no mentioning of GIA assessments in all three OP's. The Dutch gender experts/project leader both say that the ESF needs more GIA's. In Ireland everyone who was responsible for a funded programme had to fill in a GIA form. Which, according to the gender expert, had a very positive effect on the implementation process. None of the three agencies has really addressed the potential negative outcome of project on men and women, at least not specifically. To my opinion, Brandenburg had the biggest discrepancy between 'formal' and 'practical' implementation. Since they had addressed GM quite well in their OP and not in throughout the organization. The project leader even mentioned that it was a paper commitment. The Netherlands did not suffer from a discrepancy since they did not commit themselves formally nor practically and Ireland basically implemented or made efforts to implement what was in formally committed to.

## **Redesigning**

At all three ESF offices there was a no major redesigning. In Ireland this is was also because they have been redesigning their policies before the start of the funding period. In the Netherlands there was some little redesigning on project level. Implementing partners are very divers, it can be universities or regional governments and non-profit and profit organizations. Not all these organizations are gender competent. At all of the ESF offices these implementing partners could apply for a gender training,

however not everyone did. Most of the project staff did not know what GM was. The factor 'broad participation of actors' has been mentioned in the OP as the plan to broadly implement GM throughout all departments and not only leave the responsibility with the gender quality department. However, in the interviews people clearly indicated the fact that in practice the responsibility for GM lies mainly in the gender equality department and it would increase the extend of implementation if the responsibility would be more broadly spread through the organization.

Some additional fostering and hindering factors have been mentioned by the interviewed people. The most mentioned (hindering) factor is the complexity of the concept. Also called abstract, untranslatable, "does not mean anything", multi-interpretable and difficult to translate to day to day work. Everybody but the Irish policy maker and project leader have suggested to rename the concept. Some names were proposed; Diversity & Inclusion, Gender inclusion and Gender proof. Another hindering factor which was mentioned Brandenburg and the Netherlands was the lack of measurable goals and the consequences to come with it. Furthermore both in Brandenburg and the Netherlands they had difficulties to implement GM throughout the organization and so the knowledge only stayed at the theme: gender equality. Additional fostering factors which came up were; Top down management, both Brandenburg and the Netherlands mentioned that the lack of a strong top-down management and commitment hindered the implementation of GM. The Dutch project leader stated that development of new policy structures is a fostering factor. Furthermore all three offices mentioned using GM as a solution to a broad National/ Regional problem as a fostering factor.

## CHAPTER 5

# CONCLUSION AND RECOMMENDATIONS

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**Chapter 5** This chapter concludes on the research outcomes by answering the main research question and the sub questions. Furthermore it suggest recommendations to the ESF agencies and the European Commission. It ends with a consideration of the limitations of this research.

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## 5. Conclusion and recommendations

The conclusion will answer the research questions developed in chapter 1. The aim of this research is to find out what the hindering and fostering factors of the implementation of GM were, when it was first introduced as a concept in the ESF in the funding period 2000-2006. The reason for this is to learn lessons from the positive and the negative aspects and to use this knowledge in the future within ESF agencies. The research question is:

*"What factors promote and hinder the implementation of Gender Mainstreaming in the European Social Fund"*

In order to answer the research questions, six sub questions are presented in the first chapter, those will be answered, starting with the first; what is Gender Mainstreaming and how can it be defined? GM is different from previous approaches to equal opportunities in several ways. Previous approaches have been mainly focussing on measures specifically in favour of women. However, the disparities that continue to exist between men and women are not only caused by weaknesses in qualifications, experiences and situations of women, they are also caused by structural inequalities in the organization of work and family life. Women and men do not have the same roles, resources and needs, being blind to these differences leads to policies and programmes which do not bring equal benefits and even tend to place a greater burden on certain groups than on others (Braithwaite 1999). According to the GM concept, a better way to achieve gender equality in policy-making is to take into account in every policy-making process and every planning process of programmes, that the outcome of these should be equal for both sexes.

The conclusion that can be drawn from the conceptual analysis is that GM is above all a complicated process. The confusion around the exact meaning of the concept can cause problems in the implementation process. Furthermore, there is not a lot of research and literature on how to measure the extent to which GM is implemented. I define GM in policy making as follows: *"verifying how men and women are affected differently by policy and if needed revising policy in order to create a more equal outcome"*.

The second sub question is; what influencing factors on the implementation of GM can be found in literature? Implementation theories have been researched from different approaches; organizational, sociological and political. The influencing factors which were drawn from these theories were put in a list of twelve fostering factors. Each of these factors were under one of the phases: Organizing, Learning, Assessing, Redesigning (OLAR) in the implementation process in order to put it them in a context. This created the OLAR checklist for GM (for revised version, see figure 6).

The third sub question is; by which indicators can the implementation of Gender Mainstreaming be measured? In order to find out what the fostering and hindering factors are, we should measure whether GM is implemented. Based on both the conceptual analysis and the implementation theories in chapter 3, I developed a list of indicators to measure to what extent Gender Mainstreaming is implemented. The list consist of nine indicators:

1. Is there a concrete and unambiguous perspective of Gender Mainstreaming in the OP? - throughout the organization?
2. Are data and indicators gender desegregated?
3. Does the goal of policy /projects reflects the needs of both men and women?
4. Do planned activities involve both men and women?
5. Have stereotyping and other structural barriers (practical, cultural, altitudinal, institutional, economic) preventing full participation of women or men have been considered?
6. Are the consequences of the potential projects effects being considered for men and women?
7. Are the implementing bodies gender trained?
8. Are gender impact assessments (GIA) being performed?
9. Is the mainstreaming of gender policies addressed in evaluations?

The outcomes of researching these indicators in the three cases answer the fourth sub question; to what extent was the principle of Gender Mainstreaming used when developing projects and policies? The GM indicators showed that in Ireland, as for the OP and the evaluation, GM is well-integrated; there is attention for explaining the concepts as well as a strategy on how to implement the concept. In Brandenburg, the consideration of the gender mainstream approach in the programme implementation and monitoring as well as in the authorization of grants is only rudimentarily achieved. The Netherlands did not commit itself to the concept on paper nor in practice and the conclusion is that GM is not implemented at all in this ESF agency. In practice, only according to the Irish ESF policy-maker and gender expert and project leader, GM is implemented. According to the all three Dutch interviewed actors, it is not implemented at all and according to the policy maker in Brandenburg the concept is not-well implemented throughout the organization. The three offices have a different way of approaching GM. Ireland approaches it as a solution to an economical problem. But if the problem is solved or has disappeared otherwise, will GM still be an important policy? The Dutch approach it more as a social inclusion policy, and emphasize the social position of women. Brandenburg does both, it emphasized the social position of women and tries to use to decrease the female brain drain in Brandenburg.

The three cases are analysed against the OLAR checklist to find out which of these factors were present and considered a fostering factor in implementing GM. The outcomes of the analysis answer sub question 5; which factors fostered and hindered Gender Mainstreaming within the ESF?

Table 6.

<b>Fostering factor</b>	<b>BB</b>	<b>NL</b>	<b>IRL</b>
Preparation of organization for intra- and inter-organizational problems			
National / Regional political support	<b>P +</b>	<b>P +</b>	<b>P +</b>
Active support from the European Commission	+	+	
Available resources in terms of money, people and knowledge	+	+	<b>P</b>
A new created unit to handle the new activity	<b>P +</b>		<b>P +</b>
A specific description of expected activity	+	+	<b>P +</b>
Involvement and consultation of gender experts and women's organizations	+	<b>P +</b>	<b>P +</b>
Attention for culture and norm changing	+	+	<b>P+</b>
A new communication strategy to inform people on the win-win strategy of GM	<b>P +</b>	+	<b>P +</b>
Considering the potential negative outcome on men or women			
A broad participation of actors	+	+	<b>P +</b>
Redesigning policy-making structures, policies and budgets		+	<b>P +</b>
Gender competent implementing bodies	+	+	<b>P +</b>

P= Present factor

+ = Considered a fostering factor

The most fostering factors are; National and Regional political support. Mostly because it created understanding of the importance of the concept among staff members and society as a whole. A specific description of activity. Due to the complexity of the concept, a concrete description on how to apply GM in daily work appeared to be very important. Active support and pressure from the European Commission was also an important fostering factor, also because it contributed to a more motivated staff. Broad participation of actors appeared to be a very difficult but fostering factor. The problem is that GM is seen as a responsibility of the gender equality thematic area and therefore expertise support (when available). Whilst equal outcomes for men and women should be held into account in every policy area. The creation of new unit to handle GM, worked out really well in Ireland, since there was a lot of knowledge and time to guide people with implementing GM in their daily job. Communicating the win-win strategy was a considered a big fostering factor in all agencies although only Ireland really communicated it, Brandenburg tried to on a small scale and the Netherlands did not communicate this at all. Some additional fostering and hindering factors have been mentioned by the interviewed people. The most mentioned (hindering) factor is the complexity of the concept. Also called abstract, untranslatable, "does not mean anything", multi-interpretable and difficult to translate to day to day work. Everybody but the Irish policy maker and project leader have suggested to rename the concept. Some names were proposed; Diversity & Inclusion, Gender inclusion and Gender proof. Another hindering factor which was mentioned Brandenburg and the Netherlands was the lack of measurable goals and the consequences to come with it. Additional fostering factors which came up were; Top down management, both Brandenburg and the Netherlands mentioned that the lack of a strong top-down management and commitment hindered the implementation of GM. The Dutch project leader stated that development of new policy structures is a

fostering factor. Based on this analysis the OLAR checklist is revised and adapted and gives an updated checklist of fostering factors of the implementation of GM and can be used as a guiding instrument when implementing the concept. The adapted and additional questions are in italics

Figure 6.

## **OLAR Checklist**

### **1. Organising**

- *Is there a strong commitment from the top and a top-down management strategy?*
- Is there National / Regional political support or can it be lobbied for?
- Is there active support from the European Commission?
- Are resources available in terms of money, people, time and knowledge?
- Has a new unit been created to handle the new activity with a specific mandate?
- Is there a specific description of expected activity?

### **2. Learning**

- Are gender experts and / or women's organizations being consulted?
- Is there attention for norm / culture changing?
- Is there a new communication strategy informing people on the win-win situation of Gender Mainstreaming?
- *Has Gender Mainstreaming been explained in a way that is applicable for the staff members?*

### **3. Assessing**

- *Are there concrete goals and outcomes to achieve and are there consequences if they are not achieved?*
- Is there a discrepancy between 'formal' and 'practical' implementation?

### **4. (Re)designing**

- Are policy-making structures, policies and budgets redesigned?
- Is there a broad participation of actors involved *and responsible, throughout the organization?*
- Are implementing partners gender competent *and motivated?*

The final sub question; in what way could the ESF have a more effective implementation of the principle of Gender Mainstreaming, can be answered in twofold. First, the ESF agencies can use the OLAR checklist in order to make sure all the fostering factors are present to implement GM in an effective way. Secondly, regarding the tasks for the European Commission I will make some recommendations drawn from the interviews and evaluations:

- Put more political pressure on GM

- Set concrete and realistic goals:
- Revise the concept of GM
- Organize international meetings where people can exchange best practices and get motivated
- Emphasize the (economic) win-win perspective
- Emphasize the importance of the concept by increasing its funding.
- Give the good example by not funding programmes which don't use the principle of GM
- A more critical EC monitoring Committee, specifically regarding Gender Mainstreaming
- Keep your motivating role in experimenting with projects

The most important conclusion that can be drawn from this research is that the concept of Gender Mainstreaming is very complex and difficult to implement. This conclusion shows that GM in its current form is not the perfect instrument to solve gender inequalities as some scholars and institutions claim it is. There is a gap between on the one hand, what the European Commission considers the progress is and on the other hand, what it is in reality, as can be seen from the case selection and its expected progress. I argue that it would be good idea to revise the concept of GM and make it a more practical and accessible instrument to achieve equal outcomes and perhaps rename it in a way that the concept explains itself, as for example, gender proof.

There are, as in every research, some limitations to this research. Firstly, it can be argued that the different cultures affect the way the interviewed people answered questions. The Dutch might be considered very open and perhaps that is why they came up with more negative responds than the Irish. Second; the fostering factors of GM are now researched in western European countries, but the OLAR checklist should also be researched in other countries in Europe, in order to analyze whether fostering factors are also applicable in other countries and to get a broader picture on differences. Scandinavia, for instance is known for its progressive approach on gender equality, whilst the south of Europe has a more conservative approach. The main focus of my research is to find out what the fostering and hindering factors of GM are. However, to come to this, it was necessary to determine when GM is implemented. My presented list of indicators for the implementation of GM is a start and should be developed. Little research has been done on measuring the extend of implementation of GM and in my opinion further research can contribute to a more complete and applicable list of indicators.

## APPENDICES

**Appendix I: Interview questions**

**Appendix II: Statistics Cases**

## **Appendix I Interview Questions**

### **1. Organizing**

1.1. How was Gender Mainstreaming received within the organization and did it need a lot of change within the organization?

1.2. Before practically implementing the principle of gender mainstreaming, was there a clear understanding of the concept by all? If so, how was this communicated?

1.3. Is there a specific description of the expected activity in terms of working with the principle of gender mainstreaming?

1.4. To what extent is the principle of gender mainstreaming applied in all ESF policies? How does this show?

1.5. Besides the Financial funding, what other resources were provided for gender mainstreaming? (time, people)

1.6. Were external (gender) experts involved?

1.7. What is the average age of people working at the ESF / division of sexes from 2000-2006?

1.8. Was there any National or Regional political support for Gender Mainstreaming?

### **2. Learning**

2.1. To what extent was pressure from women's organizations present?

2.2. To what extent is data, which programmes are based, upon gender desegregated?

2.3. How was the existing routine changed within the organization; for example norms, in order to reach a new way of thinking about policy?

### **3. Assessing policies**

3.1. Do planned activities involve both men and women?

3.2. Do policy goals reflect the needs of both men and women?

3.4. Have stereotyping and other structural barriers preventing full participation of men and women been considered?

3.5. Does the ESF take negative outcomes of policy or project into account? (e.g. when a project designed to foster opportunities for women, places a burden on men)

### **4. Designing**

4.1. Do you have examples of ways in which policy was redesigned to make policy outcomes more gender equal? How many projects have been developed with the principle taken into account?

4.2. Who was involved in the policy-making process (broad participation of actors)  
Did this change within the funding period? And if so why?

4.3. Which organizations practically implemented the projects / policies? and are they specifically gender competent (well-informed on the measure for equal opportunities and gender mainstreaming)?

## **5. Evaluation**

5.1. Does the monitoring and evaluation include a sex desegregated data? Which ones?

5.2. Does the evaluation examine both the 'process or realization of policy-making' (of which the gm principle is applied) as well as the content of the policy?

### **European Commission**

What is your opinion on the role of the European Commission in fostering the implementation of gender mainstreaming? Should they provide more support / more political pressure? Or less?

Are you familiar with the processes of implementation in other member states?

### **Gender Mainstreaming**

What is your opinion on the implementation of Gender Mainstreaming within the ESF? Were there any fostering factors? Or major difficulties?

Do you have the idea that Gender Mainstreaming works and how does this show, have unemployment rates for women decreased or participation increased for example?

## Appendix II: Statistics Brandenburg, the Netherlands, Ireland

### Population / Share of women

Population	1999	2007
Brandenburg	2.601000	2.56000
% women Brandenburg	50.7	50.7
The Netherlands	15.863950	16.405399
% women the Netherlands	50.5	50.6
Ireland	3744.700	4339.000
% women Ireland	50.4	48.8

Source: Die Kleine Brandenburg Statistik (2008) / : Centraal Bureau voor de Statistiek cijfers Bevolking / Operational Programme Ireland 2000-2006 Tabel 1, p 2

### Share of women / average age ESF offices

ESF Office staff members	Brandenburg	Netherlands	Ireland
Share of women	85%	62.5%	40%
Average age	40-45	35.5	30-35

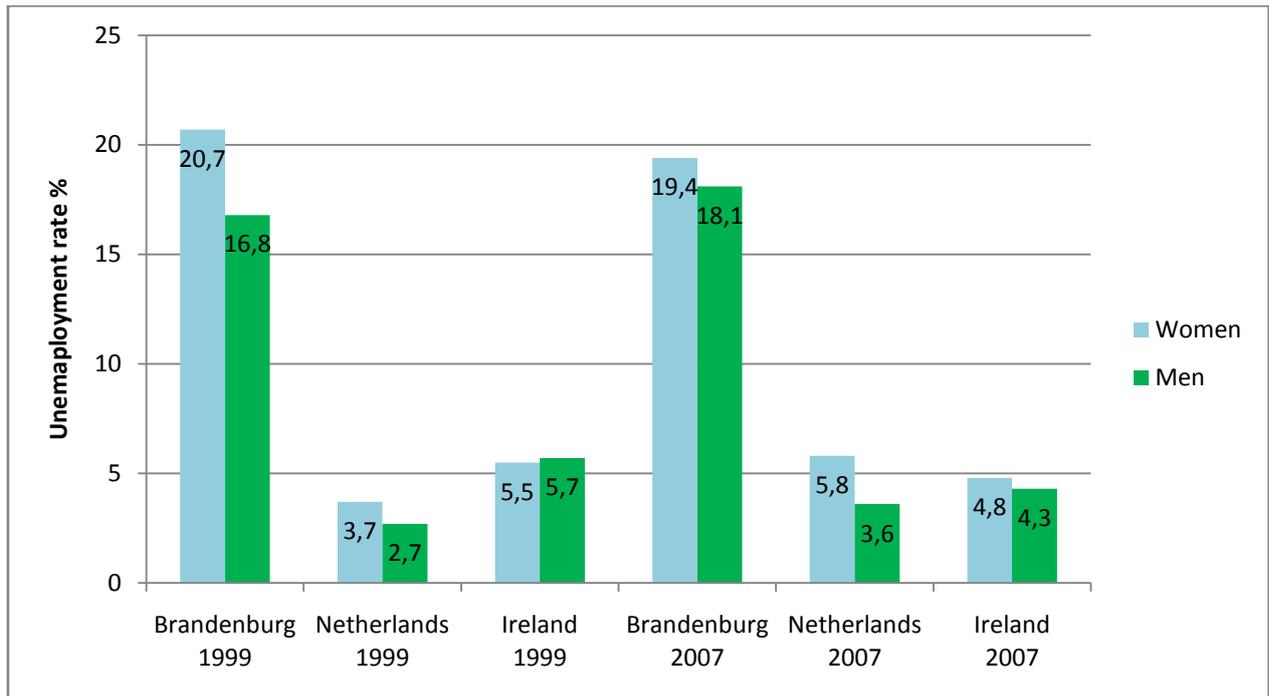
Source Interviews: Ms. Langhoff BB / Ms Vrugink NL/ Mr. Landers IRL

### Working mothers Netherlands and Ireland

Working mothers	2003	2007
<b>Netherlands:</b>		
Mothers with kids (aged 0-10) with a job over 35hours %	7.4	11.2
Mothers with kids (aged 11-17) with a job over 35hours %	7.6	16.9
<b>Ireland</b>	<b>1999</b>	
Mothers with 1 dependent child	47.5	
Mothers with 2 dependent children	50.3	
Mothers with three or more dependent children	39.0	
Mothers with part time jobs	36.0	

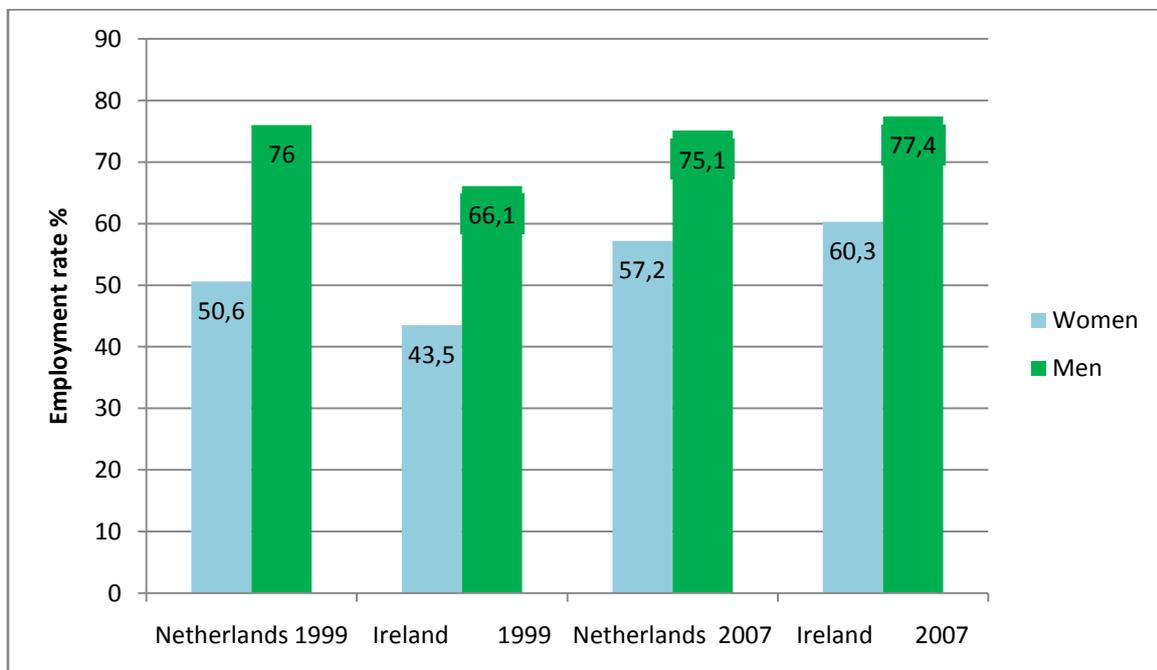
Sources: Centraal Bureau voor de Statistiek / Central Statistics Office

### Gender desegregated unemployment rates Brandenburg / Netherlands / Ireland



Source: Operationelles Programm 2000-2006 Landesregierung Brandenburg p. 115) /Centraal Bureau voor de Statistiek cijfers Arbeid en Sociale Zekerheid / Central Statistics Office.

### Gender desegregated employment rates Netherlands / Ireland



Sources: Centraal Bureau voor de Statistiek Cijfers Arbeid en Sociale Zekerheid / Central Statistics Office

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