



## EU RESEARCH ON SOCIAL SCIENCES AND HUMANITIES

*Gender – sensitive and women friendly  
public Policies: a comparative analysis of  
their progress and impact*

**EQUAPOL**

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# **EU RESEARCH ON SOCIAL SCIENCES AND HUMANITIES**

## **Gender – sensitive and women friendly public Policies: a comparative analysis of their progress and impact EQUAPOL**

### **Final report**

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<http://www.cordis.lu/fp6/citizens.htm>, for information on Priority 7 – 'Citizens and Governance in a Knowledge Based Society' under the 6<sup>th</sup> Framework Programme.

<http://improving-ser.jrc.it/default/>, the database of socio-economic projects funded under the 4<sup>th</sup> and 5<sup>th</sup> Framework Programme.

[http://europa.eu.int/comm/research/social-sciences/index\\_en.htm](http://europa.eu.int/comm/research/social-sciences/index_en.htm), Social sciences and humanities in Europa.

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## **PREFACE**

Within the Fifth Community RTD Framework Programme of the European Union (1998-2002), the Key Action *"Improving the socio-economic knowledge base"* had broad and ambitious objectives, namely: to improve our understanding of the structural changes taking place in European society, to identify ways of managing these changes and to promote active involvement of European citizens in shaping their own futures. A further important aim was to mobilise the research communities in the social sciences and humanities at the European level and to provide scientific support to policies at various levels, with particular attention to EU policy fields.

This Key Action had a total budget of 155 Million Euros and was implemented through three Calls for proposals. As a result, 185 projects involving more than 1600 research teams from 38 countries have been selected for funding and have started their research between 1999 and 2002.

Most of these projects are now finalised and results are systematically published in the form of a Final Report.

The calls have addressed different but interrelated research themes which have contributed to the objectives outlined above. These themes can be grouped under a certain number of areas of policy relevance, each of which are addressed by a significant number of projects from a variety of perspectives.

These areas are the following:

- ***Societal trends and structural change***  
16 projects, total investment of 14.6 Million Euro, 164 teams
- ***Quality of life of European Citizens***  
5 projects, total investment of 6.4 Million Euro, 36 teams
- ***European socio-economic models and challenges***  
9 projects, total investment of 9.3 Million Euro, 91 teams
- ***Social cohesion, migration and welfare***  
30 projects, total investment of 28 Million Euro, 249 teams
- ***Employment and changes in work***  
18 projects, total investment of 17.5 Million Euro, 149 teams
- ***Gender, participation and quality of life***  
13 projects, total investment of 12.3 Million Euro, 97 teams
- ***Dynamics of knowledge, generation and use***  
8 projects, total investment of 6.1 Million Euro, 77 teams
- ***Education, training and new forms of learning***  
14 projects, total investment of 12.9 Million Euro, 105 teams
- ***Economic development and dynamics***  
22 projects, total investment of 15.3 Million Euro, 134 teams
- ***Governance, democracy and citizenship***  
28 projects; total investment of 25.5 Million Euro; 233 teams
- ***Challenges from European enlargement***  
13 projects, total investment of 12.8 Million Euro, 116 teams
- ***Infrastructures to build the European Research Area***  
9 projects, total investment of 15.4 Million Euro, 74 teams.

This publication contains the final report of the project "Gender-Sensitive and Women-Friendly Public Policies : A Comparative Analysis and Assessment of their Progress and Impact", whose work has primarily contributed to the area "Gender, participation and quality of life".

The report contains information about the main scientific findings of this project and their policy implications. The research was carried out by 5 teams over a period of 28 months, starting in November 2002.

The aim of the research was to assess the progress and impact of the integration of a gender dimension on public policy formulation and design, especially in social policy fields prioritised by the European Social Policy Agenda. Policies were studied in the following eight countries: Belgium, Spain, France, Greece, Ireland, Lithuania, Sweden and the United Kingdom. The specific objectives of the research were:

- to identify, analyse and assess how the mainstreaming of gender in public policy formulation and design is proceeding across the Union;
- to identify and assess to what extent and how the integration of gender serves to improve the impact of these policies on the relative wellbeing of women and men and the reduction of gender inequalities;
- to identify, analyse and understand how the integration of gender acts to alter policy-making itself, in particular to identify the added-value of a gender dimension;
- to identify, analyse and understand the synergies between EU and national policies on gender equality/gender mainstreaming and to identify the different approaches to gender equality and gender mainstreaming;
- to catalogue and compare examples of good practice of gender-sensitive and women-friendly policies and policy-making approaches.

The results suggest that progress in implementing gender mainstreaming is slow and rather uneven. Three of the eight countries in the study – Belgium, Ireland and Sweden – can be said to show clear evidence of having introduced or being in the process of introducing gender mainstreaming. In the other countries, especially France and the UK, and to a lesser extent Greece and Spain, gender mainstreaming efforts are present, but are highly fragmented, being confined either to a particular policy domain or to a specific programme within a domain and disconnected from general governmental policy on gender. Lithuania is a case apart by virtue of its particular history and the steepness of its transition. The research found out that three components of gender mainstreaming policy are being extended - to a greater or lesser degree - across all the countries in the study:

- the setting up of dedicated gender mainstreaming units staffed by people with skills to provide technical support as required to various parts of the administration (and in some cases such as Ireland to civil society groups as well);
- the introduction of policy evaluation and monitoring mechanisms, particularly gender impact assessment methods and regular reporting mechanisms;
- changes in the way that policy is made, in particular an increase in social dialogue with the voluntary sector through the institutionalisation of consultation practices, the creation or consolidation of advisory bodies representing women's groups and equipping women's representatives with the necessary skills to participate in policy making.

However, convergence in relation to understanding of the policy problematic or the objectives of policy is more difficult to discern. Although it is true that countries tend to use a

similar line of rhetoric regarding the need to attend to the structural and cultural roots of gender inequalities, in many of them there is a significant gap between rhetoric and practice.

The abstract and executive summary presented in this edition offer the reader an overview of the main scientific and policy conclusions, before the main body of the research provided in the other chapters of this report.

As the results of the projects financed under the *Key Action* become available to the scientific and policy communities, Priority 7 "*Citizens and Governance in a Knowledge Based Society*" of the Sixth Framework Programme is building on the progress already made and aims at making a further contribution to the development of a European Research Area in the social sciences and the humanities.

I hope readers find the information in this publication both interesting and useful as well as clear evidence of the importance attached by the European Union to fostering research in the field of social sciences and the humanities.

T. LENNON,  
Director





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## Abstract

The EQUAPOL project sought to assess the progress and impact of integrating gender into public policy in Europe. The project focused on social policies prioritised by the European Social Policy Agenda, which had also called for the mainstreaming of a gender perspective in all relevant policies. Policies and policy processes in eight countries and at European level were studied by the five-partner research team, from 2002 to early 2004.

Progress in implementing a gender mainstreaming approach is found to be slow and uneven across the eight study countries, although there has been much innovation in developing tools and methods to support the integration of gender in policy-making. Sweden remains in the vanguard of countries adopting a gender mainstreaming approach, while elsewhere a “transversalist” approach is more in evidence, whereby gender is added on as an additional objective or consideration albeit across a range of policies. There is evidence of some convergence of approaches, mainly in the mechanisms of gender equality policy and institutional setup, but convergence in relation to understanding of the policy problematic and objectives is more difficult to discern. While concern for the structural and cultural roots of gender inequalities is present in rhetoric, it is little evident in practice. At national level mainstreaming has not replaced previous approaches to gender equality – notably legislation and positive action – but has rather led to a broadening of the targets of equality measures and a more complex mix of policy approaches.

The influence of European gender equality policy on national approaches has been significant, particularly where European funding provides significant resources for policy implementation (and where gender mainstreaming is a condition of EU funding). While EU policy in the form of the *acquis communautaire* has brought significant changes to legislation and institutional setup in the new member states, Lithuania’s experience indicates that the EU has been a weak influence on gender equality policy and practice, this role being played more strongly by international and regional bodies. In some countries the EU’s influence is seen as negative by key gender equality actors, undermining previous gains in some policy areas through its pursuit of a neoliberal economic agenda. Across all the study countries, the EU’s influence is seen as weakening in recent years, with a narrowing of gender equality objectives and a waning of effort and resources to implement EU policy commitments on gender equality.

# **Chapter 1**

## **Executive Summary**

### **1.1 BACKGROUND TO THE RESEARCH**

#### **1.1.1 Policy context and aims of the research**

The EQUAPOL project is subtitled “Gender-sensitive and women-friendly public policies: a comparative analysis and assessment of their progress and impact”. Since the mid 1990s the European Union and national governments in Europe have adopted a gender mainstreaming approach, which aims to make all public policy sensitive to gender differences and responsive to women’s needs. This approach implies a significant transformation in the treatment of gender equality in public policy across Europe, extending it well beyond the traditional domain of labour market policy and, at least in theory, addressing structural and systemic causes of gender inequality.

The aim of the research was to assess the progress and impact of the integration of a gender dimension on public policy formulation and design, especially in social policy fields prioritised by the European Social Policy Agenda. This Agenda, approved by the European Council in 2000, had identified a number of policy challenges, including low levels of personal incomes, low employment rates especially of women, an increasingly high dependency ratio and significant weaknesses in qualifications and skills required by the knowledge-based economy. One objective of the Social Policy Agenda is: “The long standing commitments on equality between women and men at European level should be broadened and a gender perspective should be mainstreamed into all relevant policies”.

The specific objectives of the EQUAPOL research were:

- to identify, analyse and assess how the mainstreaming of gender in public policy formulation and design is proceeding across the Union;
- to identify and assess to what extent and how the integration of gender serves to improve the impact of these policies on the relative wellbeing of women and men and the reduction of gender inequalities;
- to identify, analyse and understand how the integration of gender acts to alter policy-making itself, in particular to identify the added-value of a gender dimension;
- to identify, analyse and understand the synergies between EU and national policies on gender equality/gender mainstreaming and to identify the different approaches to gender equality and gender mainstreaming;
- to catalogue and compare examples of good practice of gender-sensitive and women-friendly policies and policy-making approaches.

#### **1.1.2 Scope of the research**

Policies in the following eight countries were studied: Belgium, Spain, France, Greece, Ireland, Lithuania, Sweden and the United Kingdom. Thus, the study covered countries such as Sweden, which have an indigenous tradition of gender equality in public policy and have led the way in the development of gender mainstreaming, as well as those such as

Greece, Ireland and Lithuania, where the introduction of gender mainstreaming has been primarily the consequence of external influences.

The project aimed to assess the integration of gender equality in two broad policy fields in each country: income distribution, in particular tax, pension and welfare policies; and education, in particular skills and qualifications in the knowledge society. For education, this was possible in all countries. For income distribution, this was possible in only two countries: Greece and Sweden. In the other countries, the lack of examples of explicit efforts to integrate gender into tax, pension or welfare policies led to a more general focus on gender mainstreaming policy.

## **1.2 MAIN FINDINGS OF THE COMPARATIVE ANALYSIS ACROSS COUNTRIES**

### **1.2.1 Summary of the main findings**

The comparative analysis focused on the approach and practice of gender policy across the eight study countries, identifying key trends and differences. The factors explaining variations across the countries were also explored.

The results suggest that progress in implementing gender mainstreaming is slow and rather patchy. While there has been much innovation in developing gender mainstreaming, progress has been uneven within and across countries. Three of the eight countries in the study – Belgium, Ireland and Sweden – can be said to show clear evidence of having introduced or being in the process of introducing gender mainstreaming. However, there is significant variation amongst them also, with Sweden clearly in the vanguard. In the other countries, especially France and the UK, and to a lesser extent Greece and Spain, gender mainstreaming efforts are present, but are highly fragmented, being confined either to a particular policy domain or to a specific programme within a domain and disconnected from general governmental policy on gender. Lithuania is a case apart by virtue of its particular history and the steepness of its transition.

There is some evidence of convergence across countries. In particular, there are three components of gender mainstreaming policy that are being extended - to a greater or lesser degree - across all the countries in the study:

- the setting up of dedicated gender mainstreaming units staffed by people with skills to provide technical support as required to various parts of the administration (and in some cases such as Ireland to civil society groups as well);
- the introduction of policy evaluation and monitoring mechanisms, particularly gender impact assessment methods and regular reporting mechanisms;
- changes in the way that policy is made, in particular an increase in social dialogue with the voluntary sector through the institutionalisation of consultation practices, the creation or consolidation of advisory bodies representing women's groups and equipping women's representatives with the necessary skills to participate in policy making.

However, any findings of convergence need to be qualified. Even those countries which have made similar levels of progress tend to follow quite different strategies. Furthermore, convergence tends to be limited to the mechanisms of gender equality policy and the institutional set up. Convergence in relation to understanding of the policy problematic or the objectives of policy is more difficult to discern. Indeed, both the understanding of the gender equality problematic and the objectives of policy show a significant level of

fragmentation, not only across countries but also across different government departments (and policy domains) within countries. For instance, although it is true that countries tend to use a similar line of rhetoric regarding the need to attend to the structural and cultural roots of gender inequalities, in many of them there is a significant gap between rhetoric and practice.

### **1.2.2 Progress in Gender Mainstreaming**

All countries examined by the EQUAPOL project have made a formal commitment to implement a gender mainstreaming approach to gender equality. However, there is evidence of a significant level of variation, first, in the extent to which such a commitment is being, or has been, fulfilled and, secondly, in the methods or strategies that are being utilised to realise this commitment.

#### Some Significant Trends

Looking across the eight countries, there are commonalities and general trends to be observed but as the following brief analysis of emerging trends will demonstrate, there are also significant differences.

One general trend is for countries to spread responsibility for gender across units or departments. In some countries ‘decentralisation’ is being achieved through the revision of equal treatment legislation in order to involve all public bodies in anti-discrimination policy (Ireland, UK); in others it is being achieved through the design of ‘transversal’ action plans on gender equality (Belgium, France, Greece, Lithuania and Spain), while in a third scenario it is being achieved through the systematic use of gender analysis tools in the design and implementation of all policies (Sweden).

Transversalism, albeit in different forms, is quite a widely-used response or strategy, especially through action plans that assign responsibility to different units for the delivery of different objectives. The research underlines the need to scrutinise transversalism carefully. While it appears to be synonymous with gender mainstreaming, it is somewhat of a different phenomenon. First, it involves no necessary change in policy-making structures or practices and, secondly, gender equality continues to be designated as a distinct or separate policy space (even though each department or unit under transversalism might come to be assigned gender equality objectives). Transversalism does not integrate gender into the core of policy, but tends to add it on as an additional objective or consideration.

Another trend is for countries to treat gender mainstreaming in an ‘a la carte’ manner, adopting selectively some of the components of gender mainstreaming, especially some of the tools or techniques, without an overall framework. Sweden is the exception in this regard in that it has in place an entire ‘package’, including prioritisation of gender equality as a goal of policy in itself and integration of the range of relevant procedures of gender mainstreaming across different levels of administration. In terms of which components or methods are favoured, the research reveals that gender mainstreaming is regarded as more or less synonymous with gender analysis of policies.

The fact that gender mainstreaming is to be found in each of the countries, albeit varying in degree and meaning, should not be taken to infer that the other approaches to gender



equality have been supplanted. Far from it: the evidence for each country is for a mix of approaches. Indeed, equal treatment and positive action remain relevant approaches to achieving gender equality. For example, in some countries positive action measures, which were originally targeted on women's employment and human capital endowments, are now being applied to the private sphere (such as domestic violence in Spain) and more widely in the public sphere beyond education and employment. Positive action measures are in addition being used as a key tool to address structural inequalities (such as institutional bias in recruitment procedures in Belgium). Apart from this, the target of positive action measures has broadened to include measures specifically targeted at men (for example boys' development programmes in Ireland) or at both women and men (gender stereotyping interventions in France, Greece and Spain).

Equal treatment legislation has also undergone important development. Thus, in many countries such legislation has been reformed to broaden both the concept of discrimination to include indirect discrimination and the sphere of application to include, for example, public services and facilities, aside from education and the workplace. In effect, the three approaches should be seen as evolving simultaneously. The contemporary mix of policy is more complex than it was in the past and the distinctions between different approaches have become less clear-cut.

#### Countries' Progress in Implementing Gender Mainstreaming

One country that stands out clearly from the rest in the extent and reach of gender mainstreaming is Sweden. The main goal, and also the rationale, for adopting a gender mainstreaming approach in Sweden is to combat the structural roots of gender inequality in society. This is regarded as a challenge that other approaches such as equal treatment and positive action have failed to meet. This kind of objective is far-reaching: its achievement requires that gender mainstreaming be deeply embedded in different spheres of activity (social, political, economic). Sweden stands in stark contrast to the other countries where the structural dimensions of gender inequality figure but rarely among the objectives of gender mainstreaming. A second distinctive characteristic of gender mainstreaming in Sweden is its reach: it aims to go beyond incorporating the gender perspective into public policy, extending it to activities emanating from all public bodies (for example, public services) as well as to those of non-public organisations in the private sector, civil society, and so on. A third characteristic of the Swedish approach to gender mainstreaming is that it is the result of a wide consensus among the different social actors and is formally embedded in key political processes. Such a level of consensus is absent in the other countries. Lastly, the Swedish case is also characterised by a high degree of innovation. This includes, amongst others, the design of innovative methods for gender mainstreaming (3-R Method, a method for analysing gender differences in representation and resources, as well as the reasons for such differences, in local government operations), the prominent role given to experts in the policy process, the incorporation of a gender impact analysis into Budget Bills, as well as the implementation of novel gender mainstreaming projects in different departments (and levels) of the administration and other public (and also private) sector bodies or organisations.

A second pattern, less advanced than Sweden, characterises Belgium and Ireland, together with the regions of Andalusia, Basque Country and Scotland. All of these jurisdictions have gone beyond a purely formal commitment to introduce a gender mainstreaming approach, by taking steps towards its implementation. Such steps mainly consist of putting

in place some of the components of gender mainstreaming (which could be conceived of as essential conditions for the implementation of a gender mainstreaming approach). These components are of three main types: techniques and procedures, structural changes and changes in the scope of the policy process, and changes in the range of actors involved.

In comparison to Sweden, all of these countries or jurisdictions are at a much earlier stage in the development of a gender mainstreaming approach. Another important point of contrast between them and Sweden concerns the objectives adopted. While in Sweden the chief objective of gender mainstreaming is to end the structural roots of gender inequality, in these countries the main objective seems to be to introduce a gender mainstreaming approach per se. In other words, in these countries gender mainstreaming is regarded more as an operational objective than as an approach, or strategy, to achieve gender equality. A related point to note is that these countries/regions lack a political concept of gender mainstreaming. Put differently, gender mainstreaming is generally viewed as a pragmatic rather than a theoretical or political matter. A third point of contrast relates to the fact that, in most of these countries, the future of gender mainstreaming remains quite uncertain (unlike Sweden where it is firmly institutionalized). In effect, the gender mainstreaming initiatives that are being carried out are new ventures; many are tied to the current Structural Funds programming period of 2000-2006 (Ireland, Andalusia) while others have but a pilot status (Belgium). In contrast, since gender mainstreaming in Sweden has become the main approach to gender equality, continuity is not an issue.

France, Greece, Lithuania, Spain and the UK represent the third grouping of countries. In all of them recent governmental documents explicitly refer to gender mainstreaming either as an objective or as a principle governing gender equality policy. However, despite these formal commitments to gender mainstreaming, except for a few initiatives, there is very little evidence that this approach is actually being implemented. Put another way: these countries show evidence of a significant gap between rhetoric and practice in relation to gender mainstreaming.

A second feature common to all of these countries is that the term 'gender mainstreaming' lacks a clear and concrete meaning and, therefore, often tends to operate as a catch-all term which is used to refer to varying approaches and activities. For example, it is not uncommon to find in these countries that the term 'gender mainstreaming' mainly functions as a new name to refer to 'old' policy practices such as positive action measures, transversal national plans involving different departments of the administration (even if such plans are clearly informed by a positive action approach) and even equal treatment legislation. Apart from this, there is also evidence in these countries that 'gender mainstreaming' is exploited to serve diverse political needs. For example, in France and Greece politicians and government officials conveniently use the term 'gender mainstreaming' to refer to a move from a focus on women to a more neutral focus on gender (which is simply understood as referring to both women and men) as the main concern of equality policy. On the other hand, in the UK the term 'gender mainstreaming' is cast in terms of sensitivity of public service providers to the diverse needs of their customers, a use indicative of the wider priorities of the New Labour government rather than of a commitment to a gender mainstreaming approach.

A third common feature is that gender mainstreaming initiatives in these countries tend to be fragmented, in that relevant efforts are confined to very specific domains and lack a connection with each other and the prevailing general policy on gender equality. For

example, in France, Greece and Spain an imbalance can be observed between progress in gender mainstreaming in the domains of education and employment and other domains. A fourth common feature shared by initiatives in these countries is that they may be the result of a great deal of effort and perseverance from individual women in key positions of power (e.g., ministers, senior civil servants, MEPs) or even women's organisations, rather than a decision, at high governmental level, to pursue a new gender equality policy approach.

### **1.2.3 Different Models of Gender Mainstreaming**

One of the key findings of the research is that gender mainstreaming has no fixed or static set of meanings. It is, as it is practised and implemented by different states and different jurisdictions, quite diverse. The actual content of gender mainstreaming practices therefore begs attention, and suggests that four models of gender mainstreaming are being pursued.

#### The integrated model

The first model can be called the integrated model of gender mainstreaming. Of the eight countries studied here, Sweden is closest to this model. In this model gender mainstreaming is seen as a strategy aimed at achieving a more gender-equal society. While in other countries such a general objective tends to be mainly rhetorical (if it exists at all), the Swedish example stands out in that policy discourse rests on a careful articulation of the notions of 'equality' and 'gender mainstreaming', as well as providing a clear rationale as to why the latter is the most suitable approach to achieve the former.

In Swedish policy discourse, the equality/inequality problematic is mainly understood in structural terms, as a problem of gendered patterns of power relations. Key to this understanding is the idea that gendered power structures affect all areas of human activity and human relations and cross the different social spheres (i.e., public as well as private). Such an understanding of the problematic signifies that gender equality policy must be designed to permeate all of these areas of human relations and activities if it is to have a real impact on the lives of ordinary women and men. In other words, gender equality policy must be all-encompassing. This also means that responsibility for gender equality cannot be confined either to a particular government body or to central government bodies but must, rather, be spread across departments and down to lower government levels that hold direct responsibility for a number of public services (e.g., health, social care, education). In addition, responsibility for gender cannot be limited to the public sector but must be shared with the private and voluntary sector as well.

#### The transversal model

The second model is called the transversal model of gender mainstreaming. Of the eight countries under study, this model is best represented by Belgium. However France and some Spanish regions like Andalusia also show evidence of this approach. In these contexts, the term 'transversality' indicates an involvement of different government departments or ministries in the implementation of a plan or programme of gender equality. Such plans require some level of cross-governmental consensus and coordination since they consist of the allocation of a number of specific gender equality objectives to each of the ministries involved. Such objectives can be quite varied, ranging from general commitments to integrate a gender perspective into the policies of a given department or ministry, to specific measures aimed at laying down the conditions for the implementation

of a gender mainstreaming approach (such as for example the production of indicators and evaluation tools). The implementation of those objectives is usually supported by a dedicated agency or unit of the administration which can be either independent in status or else attached to a given government ministry.

The countries following this approach share a tradition of gender equality policy that is dominated by a positive action approach. This renders the transversal plans distinctive in a number of ways:

- In conjunction with measures that are more focused on the implementation of gender mainstreaming, these transversal plans also contain a significant number of positive action measures and, in many cases, constitute the majority of measures or actions;
- The majority of measures in these transversal plans (including some with a clear gender mainstreaming dimension) are specifically targeted at women;
- The boundaries between gender mainstreaming and positive action measures are quite fuzzy and, therefore, difficult to distinguish;
- These plans are often geared towards laying down the conditions for gender mainstreaming. In this sense, some of the relevant national or regional plans (like for example the Belgian plan) may be viewed only as a preliminary step towards the full implementation of a gender mainstreaming approach.

#### The EU-driven model

The third model of gender mainstreaming is called ‘the EU-driven model’. In the countries representing this model, the EU – especially through its requirement to integrate a gender perspective as a condition of EU funding (or, in the case of Lithuania, membership) - constitutes the main driver in the introduction of gender mainstreaming practices. Ireland is a prime case here and Greece and Spain can also be said to fit the model.

Such a dominant EU influence endows these countries with a number of interrelated features in relation to gender mainstreaming which are quite distinctive when they are put alongside the other countries. To begin with, gender mainstreaming is not part of a larger vision of gender equality as it is, say, in Sweden but is rather more of an end in itself. Furthermore, gender mainstreaming is generally understood in quite bureaucratic or technocratic terms, usually referring to gender impact assessments and other policy-making and policy evaluation procedures. A second characteristic is that, since such technical activities labelled as ‘gender mainstreaming’ are mainly confined to the context of the Structural Funds, where gender mainstreaming practices are being developed outside of these contexts (e.g., ‘coeducation’ in Spain and general equality mainstreaming in Ireland) alternative terms to ‘gender mainstreaming’ (like, for example, ‘transversality’ in Spain or ‘equality proofing’ in Ireland) are used.

A third characteristic shared by these countries is that gender mainstreaming objectives and practices have not been integrated into the mainstream of governmental policy. In effect, gender mainstreaming in the context of the Structural Funds is carried out in isolation from other elements of gender equality policy. A fourth common characteristic is that there is no evidence of inter-departmental collaboration, or indeed coordination, in the implementation of a gender mainstreaming approach. Striking examples of this are provided by both Greece and Ireland in their respective experiences in integrating a gender dimension in the education domain. In both countries, the agencies in charge of implementing gender mainstreaming in education policy are working in relative isolation

from the other activities of the relevant ministry. One possible reason for such relative isolation is the fact, that in these countries, gender mainstreaming has not evolved from an indigenous gender equality policy. Finally, a fifth characteristic is that gender mainstreaming initiatives in these countries (with the possible exception of Ireland) are greeted with some resistance by such actors as officials working in gender-dedicated agencies, academic researchers and feminist organisations. Thus, in both Spain and Greece actors interviewed claimed that the conditions in their respective countries were not ripe for the introduction of gender mainstreaming and warned of the negative impact that such policies might have on progress towards a more gender-equal society. An additional reason for such resistance to gender mainstreaming initiatives might be the fact that these are being developed within the Structural Funds programmes, and thus belong to a framework with the primary objective of increasing economic competitiveness and productivity rather than genuine gender equality objectives.

Lithuania deserves separate attention as a country where the EU influence on gender equality policy is being brought to bear mainly by women's groups which, as the key actors of gender equality in the country, have played an important role in lobbying an unsympathetic government to make progress towards the implementation of EU requirements in relation to gender, including gender mainstreaming.

#### The generic equality model

The fourth model is more a model of mainstreaming equality rather than one of gender mainstreaming proper. However, under this model mainstreaming practices that are gender specific are being developed as well. This generic model is most evident in the UK - especially in the devolved governments of Scotland, Northern Ireland and Wales. Some aspects of the model are also to be found in Ireland and, to a lesser extent, Lithuania.

In this model, gender mainstreaming practices are introduced as part of the development of a broader equality mainstreaming approach. Although there are some differences among these countries or jurisdictions in the depth and scope of equality mainstreaming practices, they mainly consist of the integration of an equality perspective into all public institutions and activities, including policy making, service provision and so on. In some cases, these developments have been triggered by the introduction of new equality legislation while in others they are the result of a broad commitment (involving government and civil society) to put equality at the heart of policy making. In the countries/regions following this model, an equality mainstreaming approach marks a new departure from the more traditional anti-discrimination approaches (the effectiveness of which was highly dependent on litigation) towards a more pro-active approach. Another common feature is a move from an equality policy that was centred on gender equality in particular to one where gender constitutes only one consideration or ground among many others (e.g., disability, race, sexual orientation and so on). As was evident from the interviews conducted in these locations, this is a contested development. A significant number of actors expressed a fear that gender considerations might be diluted or rendered less visible.

#### **1.2.4 Key Factors Affecting Progress**

In terms of explaining progress, contextual or environmental factors are very important. These include for example, a country's or region's track record and history in addressing gender inequality, the extent to which there are champions of gender within the polity or in



the public domain, the extent to which gender mainstreaming ‘fits’ with the dominant political ethos or the particular set of projects promoted by political actors. In relation to a country’s track record on gender, it is not possible to say that the length or duration of a country’s engagement with gender inequality is per se a deciding factor. Critical instead is the nature of the approach and the depth of the analysis underlying the approach. In the latter regard what matters is the extent to which there is a structural understanding of gender inequality, i.e., an analysis that is based on an understanding that structures and value systems in society contribute to the creation and persistence of gender inequality. Progress in implementing gender mainstreaming is also affected by the existence and activities of ‘champions’ of gender equality policy. These, sometimes individuals in influential positions, sometimes collective interests or groups, can be key in either turning the political spotlight on gender or keeping it on it.

In terms of the third factor – the extent to which gender mainstreaming ‘fits’ with the prevailing political climate – gender mainstreaming does not necessarily command wide support and yet unless there is a political commitment at very high levels it is unlikely to succeed. There are examples of countries where gender mainstreaming has been embraced by government but has not been realised in policy because of a lacking commitment. In addition, the apparent neutrality of the term ‘gender mainstreaming’ and its dissociation from feminist politics allows it to be exploited by decision makers as a catch-all term that fits different purposes (different to gender equality).

One can put such points differently: that the realisation of gender mainstreaming requires a series of conditions to be met. These include, in addition to those mentioned above, expertise in terms of knowledge and skills and the systematic use of evaluation and monitoring tools in policy making and a wide consensus about the objectives of gender equality between all stakeholders (in order to give the process some stability). In some countries, especially France, Greece, Lithuania and Spain, the absence of these conditions is especially striking. They particularly lack stability in the commitment to gender equality and their policy cultures are not sympathetic to activities such as evaluation and impact assessment. The fact that the conditions are not ripe heightens the likelihood that gender mainstreaming will be regarded with a considerable amount of suspicion.

A possible obstacle is a shift of gender equality policy (including gender mainstreaming) to more closely serve economic and especially labour market and productivity objectives. This is visible at both EU and member state level. Although arguably not new, an increased emphasis on labour market objectives is marked in France, Greece and the UK. This is to be seen in the objectives and content of policy (for example, gender equality initiatives in education policy in the UK) as well as in the naming of gender equality institutions (for example, renaming of Minister in charge of equality affairs in France). However, while in France and the UK this renewed focus on labour market and productivity issues is tied to national economic priorities, in Greece it is tied to the dependency that its gender equality policy has on EU Structural Fund Programming (which have a strong labour market orientation).

### **1.3 EUROPEAN AND NATIONAL POLICY SYNERGIES**

One of the aims of the EQUAPOL project was to understand the synergy between national and European approaches to gender equality in public policy, particularly the influences of



EU (and international) policy on national approaches and the similarities and differences between EU and national policies on gender equality.

### **1.3.1 Influences on National Approaches**

#### EU influence on national approaches

In general, EU gender equality policy has given gender mainstreaming efforts at national level legitimacy and credibility, and has in some countries (e.g. Ireland, Belgium) acted as a decisive force of change.

EU gender equality legislation has had a particularly positive influence on national policy development, both in countries that had previously lagged behind in terms of sex equality legislation, such as Ireland and Greece, and in the more advanced countries. In the new Member States, the alignment of national law with the *acquis communautaire* has contributed decisively to the creation of institutional bodies and legal mechanisms that support gender equality objectives.

EU financial support for positive action and gender equality measures has been a particularly strong influence on national policy development in many countries and in certain policy domains (e.g. education). The European Structural Funds have been especially important as a positive influence on national programmes to support positive action and equal opportunities for women and men, notably in Belgium, Greece, Ireland, Spain and the UK. Support for positive action at EU level is, however, observed by a number of respondents to have waned, and some argue that gender mainstreaming has been associated with a curtailment in the use of positive action as an instrument of EU gender equality policy.

Concerning the influence of more recent EU policy approaches, the views of national actors become more varied, and more critical. Many of those involved in gender equality policy at both national and EU levels express considerable disappointment and discontent about the direction and pace of EU gender equality policy.

In some policy domains, the influence of EU policy is considered weak, and in some cases negative. In Greece, the influence of EU policy on gender equality in national pensions' policy is weak and indirect, but also negative for the situation of women in the pensions system. A similar situation obtains in Lithuania, where women's organisations identify negative consequences of EU policy on women in social security and pensions systems.

Concerning the future, there is pessimism amongst some actors who have good knowledge of EU policy about the future role of the EU in leading on gender equality policy. There is a noted decrease in the ability of the European Commission to negotiate policy at European level and to provide informed insight on gender equality issues and policy. Even actors who are supportive of the concept of gender mainstreaming do not consider the EU as a source for a better understanding of the problematic of equality or inequality.

#### International influences on national approaches

The influences of international policy on national approaches to gender equality appear to be three-fold: the general influence on the introduction or reinforcement of gender

mainstreaming of the Beijing conference in 1995 and the Platform of Action, to which all EU countries are signatories; international influences on the development of gender mainstreaming methods and tools; and more specific influences, especially in the enlargement countries, of international agencies and regional bodies, many of which have adopted gender mainstreaming as a strategy, but which also strongly emphasise women's rights, women's empowerment and positive action.

The Beijing conference in 1995, and the preparations leading to it, gave a significant impetus within Europe to progress on gender equality policy and gender mainstreaming in particular, both within the European institutions and across member countries. Coinciding with the accession of Sweden (along with Finland and Austria), the Beijing Conference marks a turning point in the character of gender equality policy and its implementation in the EU, and was a significant influence on the increasing congruence of gender equality policy at national and EU levels.

International approaches have also had an important influence on the development of instruments for gender mainstreaming, most notably tools for gender analysis and gender impact assessment and, more recently, the use of gender budgeting.

In Lithuania, positive influences on the development of networks, information, learning and sharing of knowledge in the areas of women's rights and gender equality are identified as a result of actions and support by regional and international bodies (UNDP, the Swedish International Development Agency, the Nordic Council, etc.). The approaches underlying much of this support suggest the existence in Lithuania of at least differing, if not contradictory, perspectives on gender equality as a result of these external influences. This may explain the critical views of many gender equality actors about EU policy and its economic focus.

### **1.3.2 Similarities and Differences between EU and National Policies**

The variations in the current state and constituents of gender equality policy in the study countries are also played out at European level. The interdependence and interaction of the European and national systems within the overall system of governance in the EU, and the highly dynamic character of the latter since the early 1990s, inevitably mean a complex state of affairs, whereby similarities and differences change over time.

#### Policy objectives

Concerning policy objectives, the variations visible at national level amongst the study countries are reflected in the variations and contradictions evident in EU policy objectives on gender equality. The EU shares with Sweden the existence of overarching objectives on gender equality, to which all policies and programmes should contribute. Nonetheless, unlike Sweden, the objectives of gender equality in specific domains of EU policy, such as education or social protection, do not conform to those at general level and are more similar to cases such as the UK where gender equality objectives are connected with other general policy objectives (notably employment and productivity). The timing of the formulation of EU objectives helps to explain this apparent anomaly, with the general EU policy objectives on gender equality being elaborated when the influences of international and Nordic approaches to gender equality were strong, whereas current EU policies on education and social protection (and social policy in general) have been elaborated in the

framework of the Lisbon priorities, which are closely aligned with the dominant ethos of some national policies, notably, but not only, in the UK.

Concerning objectives on gender mainstreaming, EU policy is an amalgam of national approaches, ostensibly aiming to ensure that all Community policies and programmes contribute to reduced inequalities and improved equality between women and men and tackle the structural roots of gender equality (as in Sweden), but being implemented either as an objective in itself or to meet other – primarily labour market and productivity – objectives. The ‘productive’ aspects of gender equality have become increasingly dominant, in discourse and in practice, and the main progress has been in the areas of the European Structural Funds, Employment Strategy and women in science.

#### Medium of gender equality policy

One of the common media of gender equality policy at EU and national levels is equality legislation. Anti-discrimination legislation in employment and education, which are the areas addressed by the EU sex equality Directives, is at the forefront here. An interesting feature of recent developments in some countries is the introduction of equality legislation extending beyond employment-related areas, to cover public services and facilities (as in Ireland) and the private sphere (in Spain). These developments take national legislation in some countries beyond that achieved so far at EU level, where the long-proposed Directive on sex equality in goods and services was only approved (at the end of 2004) after considerable contestation by the industries concerned and following substantial reductions in its scope.

The inclusion in some national legislation of positive action (e.g. Greece and Ireland) also takes some national policies beyond the scope of EU legislation as interpreted by rulings of the European Court of Justice, which have made it difficult to pursue positive action and reduce structural inequalities between women and men, even in the field of employment and in spite of the new Article 141(4) of the Treaty of Amsterdam.

The use of plans for gender equality are also a common feature of national and EU media of gender equality policy. The Framework Strategy and annual Work Programmes of the Commission services started out as plans of action to be implemented and monitored, but they appear to have rapidly lost effectiveness as a tool for the implementation of gender mainstreaming within the European Commission or to inspire national initiatives. There are similarities here with some of the study countries, which have launched national plans as one-off events (e.g. Belgium and Lithuania) or have been unable to sustain follow-up once the launch was over (as in France).

Gender analysis and impact assessment, the main tool of gender mainstreaming in Sweden, has been a strong component of the gender mainstreaming approach at EU level. Gender impact assessment has most notably been used as an instrument of gender mainstreaming in the European Structural Funds and as part of the ‘women and science’ strategy in DG Research.

Consultation structures increased at EU level as part of the implementation of gender mainstreaming, with additional intra-institutional mechanisms for coordination and monitoring introduced within the European Commission and more recently in the European Parliament, and an additional EU-national consultation mechanism introduced in

the form of the High-Level Group on Gender Mainstreaming. However, consultation mechanisms involving non-governmental actors have not been strengthened at EU level, and opinions expressed through pre-existing consultation mechanisms involving national actors, such as the Advisory Committee and experts networks, have been increasingly sidelined. Moreover, there is a recent tendency to broaden the scope of some gender-specific equality mechanisms to cover issues equality in general.

### Institutions and actors

The basic nature of the institutional set-up for gender equality is similar in the eight study countries and at EU level, with a specific unit or department responsible for gender equality policy, either in relation to policy formulation and/or implementation. As is the case at national level, the Equal Opportunities Unit in DG EMPL has no sanctioning powers vis-à-vis other services in the Commission, and is located at a relatively low level in the institutional hierarchy. There is no dedicated European Commissioner or even Commission Director for gender equality.

The variation between the study countries in terms of the administrative autonomy of the gender equality institutions has a parallel at European level in the proposed changes in institutional set-up. In particular, the future creation of a European Gender Institute is similar to some national structures, such as the Equality Institute in Belgium. It is intended to complement the existing structures within the European Commission. However, the Institute is being created with no new additional resources and, in a context of declining political support for gender mainstreaming within the Commission, could lead to a transfer of some of the Commission's current functions of implementing and monitoring EU gender equality policy to an 'arms-length' agency, with a purely advisory role and with less ability to directly influence policy development and implementation.

With respect to actors, as at national level, the 'government' constitutes the main actor in EU gender equality policy. Other actors, such as the European Parliament, the European Women's Lobby and the European social partner organisations give opinions and are consulted, but are (increasingly) peripheral to decision-making processes. In a sense, the EU appears to combine the situation in countries such as France and Spain, where government has a near-total monopoly on public policy on gender equality, and countries such as the Ireland, Sweden and the UK, where there are officially-recognised regional or national advisory bodies on women's affairs or gender equality, which are consulted during the policy process.

As at national level, influential individual actors have played an important role at key moments in the policy trajectory at EU level, but without sustained institutional support and mechanisms, their influence can be short-lived and limited to specific policy domains. Academic experts have also played a role at EU level, as is the case in some countries, and the use of European networks of experts to provide knowledge and information and to advise the Commission on the development of national gender equality legislation and policies was an important part of the institutional set-up of EU gender equality policy in the mid 1990s. There are now only two networks, with a more limited role.

## Progress

Concerning progress in gender equality policy and in implementing gender mainstreaming, there are similarities between the EU and all of the study countries except Sweden. The EU has, like Belgium and Ireland and some regions of Spain and the UK, gone beyond a purely formal commitment to introduce a gender mainstreaming approach, and has set in place some of the components of this approach, including new structures, disaggregated statistics, assessment tools and administrative procedures to plan and monitor implementation. Unlike these countries however, the range of actors involved in EU gender equality has not been broadened, and has, in fact, been narrowed.

On more recent evidence, the degree of progress at EU level bears greater similarity to the situation in France, Greece, Lithuania and the UK, where, except for a few initiatives, there is little evidence that the approach is being implemented. As already noted, there are significant delays in implementing the Framework Strategy and annual Work Programmes. Instruments and procedures for gender impact assessment are not developed, or are not used, and there is a decline in human and financial resources allocated to the implementation of the strategy and action programme. Even in policy domains where significant progress was being made (such as science and research or the Structural Funds) recent evidence suggests a narrowing of gender equality objectives and a waning of effort in implementing previous commitments. In several policy domains, gender mainstreaming is being reduced to 'equal participation of women and men' in actions. This is already the case in education and is emerging as the future approach in science and research.

One also sees evidence of a similar fragmentation of gender mainstreaming efforts at EU level, with the most successful efforts confined to specific domains, predominantly those relating to the labour market (employment, the Structural Funds, education, science and research) and not yet reaching across the full spectrum of policy domains, as indicated clearly in EU gender equality objectives and gender mainstreaming strategy. Efforts to take gender equality into non-employment-related policy areas have faced considerable opposition within and outside the European institutions.

In effect, there is an increasing gap between the rhetoric on gender mainstreaming and actual practice at European level, making it similar in this respect to member states such as Greece and Spain. Although Lithuania differs from the other study countries in that gender mainstreaming is not part of governmental policy practices, this absence may result from the fact that negotiations on accession focused on adoption of the *acquis communautaire* (the binding sex equality legislation and mechanisms to support its implementation) and that, as part of the 'soft' and open methods of policy coordination and alignment, gender mainstreaming was not required. Recent evidence, such as the use of the gender indicators agreed as part of the gender mainstreaming approach under various Presidencies, suggests an increasingly 'hands-off' approach by the Commission where gender mainstreaming is concerned.

The reasons for the apparent difficulty in sustaining the gender mainstreaming approach at EU level differ in many respects from those in some of the study countries, such as Greece and Spain. However there might be two common reasons: the difficulty of achieving collaborative work across departments or agencies due to power struggles and competition and the existence of a patriarchal culture within the Commission, whereby gender mainstreaming does not serve the interests of those in power. A specific factor at EU level

is the narrower policy agenda overall compared to national level, the result both of the historic origins of the EU and recent political trends, and the increasing hegemony of economic policy objectives.

Changes in the broader policy and political environment have been other important factors. We point especially to two parallel policy developments since the early 1990s. On the one hand there has been a stronger development of social policy in general, with more robust policy commitments, as expressed in the Treaty of Amsterdam, a more systematic approach and support for action programmes. On the other hand, the economic agenda that led to the Lisbon goals and process was taking shape at exactly the same time. Supported by much more powerful forces, at both EU and national levels, the goals of economic and employment growth have come to dominate political priorities and processes, co-opting other 'policy priorities' as mere instruments of the higher economic goals.

This increasingly instrumental approach to gender equality parallels the direction that EU social policy as a whole has taken over this period. The guiding principle of the Social Policy Agenda, agreed at the Nice Council meeting in December 2000, is to strengthen the role of social policy as a productive factor. Gender equality has also been presented in the same light.

Moreover, in the context of joint processes of decision making and ever closer linkages between the administrations involved in policy implementation (particularly the case for social policy, which is the responsibility of the member states), EU policy objectives become more and more a common denominator or generic standard and less and less a way of raising national standards through the setting of EU benchmarks. The general move away from binding legislation to soft laws and open methods of coordination on policy, which require greater consensus at EU and member state levels, poses significant challenges for advancing gender equality, particularly when combined with political changes at national level and the hegemony of neo-liberal economic policies across Europe.

In this context, gender mainstreaming is well-adapted to serve the interests of EU social policy, through its focus on the integration of gender equality in policies and programmes (as opposed to their adaptation or transformation) and its methods (impact assessment, monitoring, evaluation) and instruments (indicators, statistics), which closely mirror those being used to implement the Lisbon goals. If applied as intended, and as laid out clearly in EU guidelines, gender mainstreaming does have the potential to reshape policies and programmes in the interests of gender equality. However, the implementation of gender mainstreaming thus far is not meeting policy commitments at EU or national levels.



## Chapter 2

### Background to the research

#### 2.1 POLICY CONTEXT OF THE RESEARCH

The EQUAPOL project responded to Research Challenge 2 of the 3rd call for RTD proposals within the FP5 Key Action “Improving Human Potential”. Research projects financed under this Research Challenge “should identify the policies which most strongly affect well being and assess the impacts of such policies on the latter. Policies to be considered may be in relation to income distribution, health care, work and labour markets and those affecting family and social networks, women and gender roles, education and training, safety and security as well as cities and the local environment; particular attention to be given to EU policies in relevant fields. Comparative analyses of “women-friendly policies” and to their implications for decisions concerning family size and career management are also of relevance here.

EQUAPOL is subtitled “Gender-sensitive and women-friendly public policies: a comparative analysis and assessment of their progress and impact”. Since the mid 1990s the European Union and national governments in Europe have adopted a gender mainstreaming approach, which aims to make all public policy sensitive to gender differences and responsive to women’s needs. This approach implies a significant transformation in the treatment of gender equality in public policy across Europe, extending it well beyond the traditional domain of labour market policy and, at least in theory, addressing structural and systemic causes of gender inequality.

The EU has been regarded as a world leader in gender equality policy<sup>1</sup>, serving not just to elaborate gender as a concern of policy in different fields but to motivate the development and application of gender sensitive policies at national Member State level. Analysis of EU policies on the equality of women reveals that they have played a central role in the making of the common market and in the Community's modernising action to reform employment patterns and welfare systems.<sup>2</sup> Gender therefore cannot be sidelined.

Gender equality is even more a priority in European policy since ratification of the Treaty of Amsterdam. Social inclusion, employment, regional development and education and training have been key public policy areas for the integration of gender equality, both at national and European levels. However “gender mainstreaming” is in its relative infancy. Given this, work is greatly needed to test its relevance and effectiveness as a means of achieving gender equality within and across these different policy fields.

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<sup>1</sup> Hafner-Burton, E. and Pollack, M. (2000) ‘Mainstreaming gender in the European Union’, *Journal of European Public Policy*, 7 (3): 432-56; Hoskyns, C. (1996) *Integrating Gender: Women, Law and Politics in the European Union*, London: Verso.

<sup>2</sup> Mazey, S. (1998) ‘The European Union and women’s rights: from the Europeanization of national agendas to the nationalization of a European agenda?’, *Journal of European Public Policy*, 59 (1): 131-52; Meehan, E. and Collins, E. (1996) ‘Women, the European Union and Britain’ in Lovenduski, J. and Norris, P. (eds.) *Women and Politics*, Oxford: Oxford University Press.

On the face of it countries appear to be generally positive in their attitude towards increased gender equality. Nonetheless, the practice is far from the rhetoric. Furthermore variation is widespread. This is true in two senses. First, some countries, such as those in Scandinavia, have an indigenous tradition of gender equality. In these cases, EU policy adds another layer of gender equality (in the process increasing complexity). There are many countries in the Union, though, with a far less developed equality tradition than is to be found in the Nordic states. In these cases EU policies are seminal, providing the foundation of the national approach to gender. These examples serve to emphasise on the one hand the importance of taking account of the national tradition and on the other the complexity which is likely to be found within the Union. There is a further source of variation as well. There are major differences between the discourses of political players such as political parties, labour union and local and central government agencies on the underlying concepts of gender as well as the weight and meaning given to sex and gender.

Against this background, the origins, formulation, context, content and operation of gender mainstreaming policies comprise a very important research topic. As a study of the FP5 IHP programme showed, there is little research on the integration of gender into policy in socio-economic fields, and the processes, and possible effects, of gender mainstreaming in policy are relatively unknown.<sup>3</sup> We know too little about how it is proceeding and whether different trajectories of “gender policy” are emerging. It is vital for the further development of gender mainstreaming in public policy in Europe that knowledge of the processes and consequences of integrating gender into public policy in key areas is improved and disseminated.

Apart from filling an information gap, another potential contribution of the research is to shed light on the effectiveness of the approaches adopted. Although the objectives of reducing gender inequalities are clear, the ways in which mainstreaming policies and strategies have been formulated and implemented places some doubt on their effectiveness. For example, Rees (1998) argues that within the EU framework policy on education, training and labour market, equal opportunities is identified as important, but the already gendered nature of these fields is not incorporated into the analyses upon which the policy is based.<sup>4</sup>

Moreover, while policy and general principles on gender mainstreaming have been clearly elaborated at European level and in many Member States, with the stated aim of reducing gender inequalities in a number of spheres (access to and participation in the labour market, remuneration, participation in decision-making, etc.), it has yet to be demonstrated that the current practice of integrating gender into the reformulation and design of public policies will achieve these objectives. The relationship between gender mainstreaming and other legal and constitutional principles such as non-discrimination and equality remains uncertain, and the “softer” and more generalist approach of gender mainstreaming may imply a watering-down of already weak equality concepts enshrined in the existing equality directives.<sup>5</sup>

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<sup>3</sup> Braithwaite, M. (2001) *Gender in Research: Gender impact assessment of the FP5 specific programmes – Improving human research potential and the socio-economic knowledge base*. A study for the European Commission, DG Research, Women and Science Unit.

<sup>4</sup> Rees, T. (1998) *Mainstreaming Equality in the European Union: Education, Training and Labour Market Policies*, London: Routledge.

<sup>5</sup> Shaw, J. (2001) *European Union Governance and the Question of Gender: A critical comment*. New York University School of Law: Jean Monnet Working Paper No.6/01.

Indeed, a number of feminist researchers argue that the transformative power of the “gender mainstreaming” approach is limited by the emphasis on individual rights and by a neo-liberal economic rationale (the “efficiency” argument for gender mainstreaming) or may – for example in countries dominated by nationalistic, Catholic discourse - be used to assert women’s traditional roles in the family and reproduction.<sup>6</sup> Thus, the real objectives and impact of the practice of gender mainstreaming must be assessed against the national pattern and tradition as well as the many possible goals and interpretations of gender equality.

## **2.2 RESEARCH OBJECTIVES AND SCOPE**

An overall objective is to problematise the policy process, by looking at how gender equality policy becomes institutionalised. There are interesting issues here about implementation, in general and in relation to EU-originating policies (how are general statements translated into policy practice?) and also about the circumstances or conditions under which particular policies can garner political and institutional support.

The specific objectives of the EQUAPOL research were:

- to identify, analyse and assess how the mainstreaming of gender in public policy formulation and design is proceeding across the Union;
- to identify and assess to what extent and how the integration of gender serves to improve the impact of these policies on the relative wellbeing of women and men and the reduction of gender inequalities;
- to identify, analyse and understand how the integration of gender acts to alter policy-making itself, in particular to identify the added-value of a gender dimension;
- to identify, analyse and understand the synergies between EU and national policies on gender equality/gender mainstreaming and to identify the different approaches to gender equality and gender mainstreaming;
- to catalogue and compare examples of good practice of gender-sensitive and women-friendly policies and policy-making approaches.

Policies in the following eight countries were studied: Belgium, Spain, France, Greece, Ireland, Lithuania, Sweden and the United Kingdom. Thus, the study covered countries such as Sweden, which have an indigenous tradition of gender equality in public policy and have led the way in the development of gender mainstreaming, as well as those such as Greece, Ireland and Lithuania, where the introduction of gender mainstreaming has been primarily the consequence of external influences.

The project aimed to assess the integration of gender equality in two broad policy fields in each country: income distribution, in particular tax, pension and welfare policies; and education, in particular skills and qualifications in the knowledge society. For education, this was possible in all countries. For income distribution, this was possible in only two countries: Greece and Sweden. In the other countries, the lack of examples of explicit

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<sup>6</sup> Charkiewicz, E. (2001) *Gender Mainstreaming for Invisibility or Women’s Empowerment*. Paper presented at the WIDE Annual Conference 2001; Duncan, S. (1996) ‘Obstacles to a successful equal opportunities policy in the European Union’, *The European Journal of Women’s Studies*, no 3: 399-422; Runyan, A.S. (1999) ‘Women in the neoliberal “frame”’, in Meyer, M. and Prügl, E. (eds.) *Gender Politics in Global Governance*, Rowman & Littlefield.

efforts to integrate gender into tax, pension or welfare policies led to a more general focus on gender mainstreaming policy.

## **2.3 PROJECT PARTNERSHIP**

The five partners of EQUAPOL are:

- The Centre for Social Morphology and Social Policy (KEKMOKOP), Panteion University, Athens, Greece, which led the project and undertook the country research in Greece
- School of Sociology and Social Policy at Queen's University Belfast, UK, which undertook the country research in Ireland, UK and Spain and was responsible for the cross-country comparative analysis.
- The Department of Applied Economics, Université Libre de Bruxelles (DULBEA), Brussels, Belgium, which undertook the country research in Belgium and France.
- The Gender & Technology Division, Department of Human Work Sciences, Luleå University of Technology, Sweden, which undertook the country research in Sweden.
- The Institute of Philosophy, Sociology and Law, Lithuanian University of Law, which undertook the country research in Lithuania.

The management team involved the lead scientists from KEKMOKOP (Dr Maria Stratigaki, Dr Mary Braithwaite and Prof. Nikos Kokosolakis) and Queen's University Belfast (Prof. Mary Daly). The scientific committee involved the responsible scientific officers from all five partner organisations.

## **1.3 RESEARCH METHODOLOGY AND WORK PROGRAMME**

The core of the EQUAPOL project has been an active investigation of the policy process, involving analysis of the content of policy, the processes of policy formulation and implementation and some outcomes associated with gender mainstreaming and other approaches to gender equality policy. Towards these ends, empirical research has been carried out to determine the current state of affairs with regard to integrating gender into policy making across a range of Member States and to compare the models which are being implemented.

The research has been comparative in design. Particular domains of policy and policy making have been the units of observation. Comparative analyses of policy approaches, in the three different fields of income, education and social integration within and between Member States, form the heart of the research. As outlined earlier, three types of comparison will be undertaken: a comparison of different policy domains within each national setting, a comparison of policy domains across national settings, and a comparison of national approaches to European policies and strategies on gender. 16 case studies of policy have been undertaken in all, two in each of the eight countries.

Three main methods of data collection have been employed:

1. **Documentary analysis**, undertaken on a range of documents associated with the policy process, such as memoranda, policy proposals, decisions taken, supporting background information as well as published reports and statistics.
2. **Interviewing** to gather first-hand information. Interviews with policy makers (at local, national and international levels), the social partners and representatives of civil society (especially NGOS working on gender issues) have been carried out. Policy actors in the EU will also be included. Around 15 in-depth interviews were carried out in each national setting.
3. Some **participatory workshops** were organised with experts in a range of different settings, and some **observation** (of policy meetings) was also possible.

The research project was organised in eight work packages:

#### Work package 1

The initial phase of the research project involved establishing the scientific partnership as an active entity. The preparatory steps included setting up the systems for managing the contract and project as a whole and for internal communication between the partners, as well as administrative and management procedures relating to contractual issues, finances and reporting.

#### Work package 2

Work package 2 involved undertaking the literature review, which covered national, European and international material, including the results of independent/academic research, Government reports (policy statements, evaluations, etc.) and other relevant documents. Deliverable 1, the literature review, was the main output of this phase.

#### Work package 3

WP3 involved an initial survey of policies covering the two fields selected (income, education) in the EU and in the countries to be covered. Relevant policies from non-EU countries (e.g. US, Canada, Australia, South Africa) as well as from international institutions (for example the UN agencies) were also identified in this phase.

A first step involved identifying policies, in the selected fields and in the countries concerned, which were formulated and designed with an explicit commitment to integrating a gender or women's perspective or to ensuring a positive impact on gender equality. Some of the countries under study have a general commitment to integrating gender into all national policies, while others have targeted particular policy areas (e.g. education, welfare) as priorities for contributing to reduced gender inequalities.

A second step was to obtain documentation on the "gender-sensitive" or "women-friendly" policies, so as to identify their stage of development (being designed, already being implemented, evaluation results available, etc.) and to make an initial analysis of the policies in terms of the three types of gender equality policy. An overview of the identified policies was prepared, to enable the selection of those policies that could profitably be further studied in the selected fields and in the countries concerned.

A third step involved identifying and selecting suitable policies for further analysis. Eight reports summarising the situation in each of the countries studied, and a further report identifying good practice policies from other countries, were produced, forming Deliverable 2.



#### Work package 4

This fourth phase clarified the theoretical frame of the project and involved elaboration of conceptual and analytical frameworks and of the detailed methodologies for the conduct of the case studies, on the basis of the policies selected (for example, the institutions responsible, their stage in the policy cycle, the scale of the policy, etc.). Frameworks and methods for handling the empirical data were also elaborated at this point.

The objectives and hypotheses, as well as the conceptual and analytical frameworks, for the research were further elaborated during this phase, on the basis of pilot work in the selected policy fields across countries. During the literature survey in work package 2, a limited number of policies (3 or 4), on which a sufficient quantity and quality of information is readily available, were selected. The conceptual and analytical frameworks were used to undertake a preliminary analysis of these policies, on the basis of the available documentary material. Criteria for the assessment of the frameworks included: their clarity; their logic and comprehensiveness; their relevance to different policy and country contexts; and their results (the knowledge and understanding gained about the policies and the policy process).

A short methodological report (Deliverable 3), which explained the pilot work and its results as well as the selected frameworks and final research objectives and hypotheses, was produced at the end of this phase.

#### Work package 5

WP5 formed the core of the research; active investigation of the selected policies in the countries concerned. 16 case studies of policy were undertaken in all.

The methodology included: documentary analysis; interviews with policy-makers and participants; participatory workshops with experts; observation of the policy process, for example through participation in consultation events or other meetings. The focus at this stage was on the collection and analysis of a range of high quality empirical data.

The documents collected and analysed included: policy statements; legislative texts; surveys and studies undertaken in the context of policy formulation and design; policy guidelines; policy reviews; and evaluation or monitoring reports.

Face-to-face meetings (interviews, small focus groups or workshops) were undertaken with policy-makers and other key participants in the policy-making process; including:

- research and policy staff in the Government Ministries and Departments with line responsibility for the policies being studied;
- research and policy staff concerned by the policy fields in the Government Ministries or Departments responsible for women's affairs or equality issues;
- representatives of the social partners where these are relevant actors;
- leading experts from research institutes which closely follow policies in the fields and countries concerned;
- senior researchers or policy experts in independent equal opportunities bodies or civil society organisations responsible for following and commenting on policy reform in the policy fields concerned.

The outputs were national reports covering the policy context as well as the individual policies assessed (Deliverable 4).

#### Work package 6

WP6 involved comparative analyses of the findings from the individual case studies. The 16 case studies were brought together and their similarities and dissimilarities identified and analysed. Comparisons were made not only between policies and countries, but also between national, EU and – where relevant - international policies. As well as the



comparative detail within and across policy domains and countries, work was also carried out at this phase to identify the typologies of approaches to gender equality policy which are to be found in Europe today. The output was an overall comparative report (Deliverable 5).

#### Work package 7

WP7 focused specifically on the dissemination of the research results. Since the study has clear policy implications, a series of dissemination activities have been organised, at European and national levels. National thematic seminars were organised as well as a European conference in Athens, to which key policy-makers were invited. Reports of the conference and seminars were produced at the end of this phase (Deliverables 6 and 7).

#### Work package 8

This has been the final phase, involving the overall reporting on the research project. This includes an Executive Summary (synthesis report, Deliverable 11), translated into six languages and published by the partners, as well as the Final Report (Deliverable 9) and a Dissemination Report (Deliverable 10).

A list of the deliverables produced by the project is contained in Annex 2.



## **Chapter 3**

### **Main findings of the country case studies**

This chapter provides an overview of the main developments in gender equality policy in each country. Its purpose is to offer an integrated pen picture of the main features of policy within the national setting and the factors that explain these developments. It is an important backdrop to the comparative analysis that follows in the next chapter.

#### **3.1 BELGIUM**

In recent years, significant effort has been invested in Belgium towards the introduction of a gender mainstreaming approach. Although gender mainstreaming practices are yet to be fully institutionalised, the pilot project Strategic Plan for Equality Affairs, carried out during the years 2000 to 2002, built a basis for the consolidation of gender mainstreaming as the main approach to gender equality in the country. Broadly speaking, the project involved a commitment, on the part of each federal ministry, to achieve a set of objectives in relation to gender equality. The endeavour was supported by a dedicated gender mainstreaming unit, staffed by academic experts. These experts liaised with both decision makers – in that individuals in the diverse ministerial cabinets were specifically designated to take responsibility for the implementation of the Plan, and the civil service – through designated officials with a role of ensuring its follow-up.

The most innovative aspect of this pilot project was that it generated synergies between the academic experts (located at the gender mainstreaming unit), politicians and civil servants, as each party made important contributions to it, according to their different sets of skills and interests. Thus, while the experts brought to the project theoretical knowledge about gender equality as well as technical expertise about tools and methods for gender mainstreaming, the politicians and civil servants brought knowledge and expertise in relation to political and administrative processes. Such synergies also contributed to raising the overall quality of the project, furnishing it with a strong knowledge and evidence base, a methodological framework and evaluation tools.

Another important outcome of the Strategic Plan for Equality Affairs, apart from laying down the base for the integration of a gender perspective into Belgian policy, was the set of valuable lessons that it provided for the further development of gender mainstreaming, both in Belgium and elsewhere. The first lesson is the need to promote cooperation among different ministries, apart from that between academic experts, politicians and the civil service within each ministry. This is an element that was overlooked in the project, therefore undermining its original transversal dimension. Thus, while some objectives required the collective intervention of different ministries, the project focused too much on the objectives allocated to each ministry, in isolation from the rest.

A second lesson offered by the Belgian Plan is that it revealed significant tensions between the transversal dimension of gender mainstreaming and the existing institutional arrangements which have traditionally functioned according to a sector-based logic. Such sectoral logic, while suitable for a positive action approach, is not suitable for gender mainstreaming since it requires the involvement of all policy makers in the implementation of gender equality objectives, irrespective of their specific area of policy. In sum, gender

mainstreaming requires organisational change whereas the Belgian project, in keeping with traditional arrangements, involved just one dedicated official within each ministry, leaving intact the responsibilities of the rest of the officials.

A third lesson to be learned from the Belgian experience is that, when the principal aim of gender equality policy is to lay down the conditions for the introduction of a gender mainstreaming approach, it is easy to lose sight of the overarching objectives of the policy. When this happens, policy becomes a mere procedural enterprise, devoid of any guiding vision of gender equality to infuse it with purposeful meaning.

It is still too early to assess the impact of the Strategic Plan for Equality Affairs on the future of Belgian equality policy. The main question is whether there will be any continuation of the policy initiated by the Plan such as, for example, another Plan that will build upon its results. Although the gender mainstreaming unit of experts was disbanded upon the completion of the pilot project, there are some signs of continuity. Thus, the recent establishment of the Institute for Gender Equality - an independent institution with responsibility for supporting and coordinating gender equality policy across the different federal ministries - appears to be a continuation of the role played by the previous gender mainstreaming unit. The continuation of the policy initiated by the Plan is also facilitated by a broader legal framework (where the pilot project originated in the first place) requiring each federal ministry to report efforts towards gender equality to the parliament on an annual basis.

### **3.2 SPAIN**

Gender mainstreaming practice is still quite alien to Spanish policy making. Rather than gender mainstreaming, the principal concept used in Spain since 1988 for advancing women's equality in all sectors of society has been that of 'transversality', implemented through an elaborate series of 'equality plans', consisting of a structured set of initiatives spanning different policy domains. Plans are elaborated and overseen by the Women's Institute at central level in consultation with the departments that are involved in their implementation. Aside from the plans from the Women's Institute at central government level, all regional administrations have since 1989 elaborated their own equality plans.

The Fourth National Equality Plan Between Women and Men for the period 2003-2006 is inspired by the principles of gender mainstreaming and cooperation between different social institutions. The plan incorporates a number of measures that are usually regarded as necessary for the effective implementation of gender mainstreaming. However, there is a question of whether and to what extent these measures will be effectively implemented within the period of the Plan.

At central government level, the main actors are those who are members of the Advisory Council (*Consejo Rector*) of the Women's Institute. The Council has the role of directly involving government departments and civil society in the formulation, implementation and evaluation of equality policies. It needs to be noted, though, that the Advisory Council meets very sporadically and that its role as a consultative and participatory body has been subject to criticism. As a result, the effective involvement of non-governmental actors in the policy process is more limited than might initially appear, and is hampered by the scarcity and relative weakness of formal mechanisms of social dialogue.

There are three identifiable trends in gender equality policy in Spain. Two are characterised by the fact that they embody significant contradictions between discourse and action. First, although the inclusion of gender mainstreaming as a guiding principle and objective in both the national and regional equality plans suggests that this is an approach to gender equality which has been widely accepted, in practice very little seems to be happening outside of the procedures associated with the disbursement of the Structural Funds. Second, although 'social dialogue' has become a 'politically correct' term, frequently used in government and administrative circles as a motto that describes the governing style of the current political party in power, participation and dialogue are regarded by the principal social actors as very poor. Third, while gender mainstreaming has been widely accepted in government and bureaucratic circles at national and regional levels, the concept is very rarely used by non-governmental actors. This is not due to lack of knowledge, but rather to a dissatisfaction either with the concept of gender mainstreaming or with the way that it has been appropriated by officials in government institutions.

### Education Policy

'Coeducation policy' is the term used in Spain to refer to what in Anglophone discourse is typically understood as a policy of equal opportunities between women and men in the educational domain. Specifically, it is understood as a deliberate intervention geared towards overcoming gender stereotypes that are entrenched within the educational system. In Spain, coeducation policy is often viewed as part of a wider policy aimed at the promotion of 'education in values'. These values are what are commonly regarded as human and democratic values.

Coeducation programmes and initiatives have been implemented throughout the Spanish state from the late 1970s and early 1980s, at both central and regional levels of government. Such programmes have represented one of the main focal points of gender equality policy in the country, yielding many important achievements. The implementation of specific coeducation programmes in schools and other education centres is the responsibility of regional government and is usually led by regional women's agencies in close collaboration with the education departments of regional administrations. Consequently, the range of activities led by the central Women's Institute in matters of coeducation is quite small when compared with what happens at regional level.

While the promotion of values in education and the fight against stereotypical models of masculine and feminine are important objectives of coeducation policy today, they have not always been so prominent. Since 1988, however, gender stereotyping has gradually come to occupy a more central objective while other objectives have lost currency.

One identifiable trend in Spanish education policy during the last ten years has been the marginalisation, on the part of the central government, of gender equality issues within the educational domain. This has been accompanied by the re-elevation of the Catholic Church as an actor in the educational system and a key consultant on educational policy. People are not uncritical of this trend, particularly the actors and stakeholders most directly involved in the development of coeducation policy.

### **3.2.1 Effects of gender equality policy**

There was widespread dissatisfaction among respondents in regard to the use of the term 'gender equality'. This occasionally extended to dissatisfaction with the very term 'gender' itself, especially as employed in concepts such as 'gender violence' or 'gender mainstreaming'. General agreement on the problematic nature of the term 'gender' was matched by a comparable level of agreement concerning the nature of the substantive problematic of equality and inequality. In both governmental and non-governmental institutions there was a shared perception of inequalities as deeply rooted in culture and tradition and therefore as requiring a transformation of norms and behaviour. However, no clear pattern emerged concerning the way in which equality and inequality were understood and conceptualised in specific and concrete circumstances. Thus, respondents were quite divided in their views on the equality/difference issue and some expressed concerns about 'feminisms of difference'. In their responses to questions about the problematic of equality and inequality respondents showed a strong preference to talk in terms of specific issues for policy rather than in more abstract terms. Two concrete issues in particular emerged as priorities: women's situation in the labour market and violence against women. This indicates that the 'grand' problematic of inequality is viewed as being manifested in both the private and public spheres.

With regard to approaches to gender equality being pursued, respondents agreed on the need for more legislation and more positive action measures, drawing attention in their replies to the wide scope for improvement in and further development of each approach. Views on gender mainstreaming were much more fragmented. Generally the pattern was for respondents in non-governmental institutions to either remain silent about gender mainstreaming or raise it only to criticise it very strongly. Those in the civil service were generally much more favourable towards the approach. Overall, the opinions about gender mainstreaming reveal two important points. The first is that gender mainstreaming is a concept largely confined to the official institutions of central and regional government. Hence it remains something of an alien concept for the women in the feminist movement in Spain. The second point is that the approach seems to be much easier to develop in smaller administrations as the experience of Andalusia or the Basque Country would suggest.

Despite significant fragmentation in the views of respondents about gender mainstreaming, there were a number of issues that were consistently raised during the interviews. People spoke, first, of the need for a 'dual approach'. Secondly, they spoke of the need to educate civil servants and other stakeholders on the concept of gender mainstreaming. Thirdly, respondents adverted to the need to give more clarity to the concept. And fourthly, people expressed reservations about the potential of this policy approach to effect change.

In relation to the effects of gender equality policy on the policy process, the only developments that were worthy of note by respondents were those taking place at the regional, rather than at the national, level.

### **3.2.2 Contribution of gender to policy quality**

Of all the topics covered in the interviews, it was the involvement of actors in policy that stimulated most analysis and criticism. Opinions vary widely on the matter, depending on respondents' institutions and the government level/territorial unit to which the institutions



belong. Despite marked differences, however, there were recurrent themes common to most of the interviews, especially in relation to the identification of key actors and respondents' views on the role of such actors in policy making.

To begin with, most respondents agreed on the identity of the main actors on gender equality in the country. However, respondents' assessments of the relative role and position of these actors in the policy-making process were highly qualified. Such replies provide a picture of gender equality policy in Spain as being rather marginalised in policy. For example, the role of the Women's Institute in gender equality policy was extensively discussed by a number of respondents who view this institution as lacking real power within the wider policy context. Secondly, respondents were also in agreement about the minor role played by the women's movement. Although there were regional differences regarding the perceived degree of involvement of women's associations, and also in whether matters have improved, the majority of those interviewed saw the women's movement in Spain as fragmented, divided among ideological lines, highly focused on particular issues (such as violence against women), poorly coordinated and poorly trained. Thirdly, the lack of influence of the women's movement was usually contrasted to the role played by political parties. A number of respondents pointed to the important influence exerted by the *PSOE* in advancing gender equality policy, especially in those regions in which it holds power, such as Andalusia.

Despite this consensus regarding actors and their relative influence on policy-making processes, opinion was divided on the matter of the degree of involvement and participation of actors. Such differences in opinion were especially marked between national and regional-level actors. Respondents at central government level were most critical of the degree of participation in policy-making processes. These respondents were especially outspoken about, as they see it, the politics of exclusion from participation carried out by the Women's Institute since the centre-right party *Partido Popular* took power in 1996.

With regard to inter-institutional relations, the interviews revealed important tensions and lack of communication between central government and the regions.

### **3.2.3 Developments at regional level**

An important finding of the research on Spain is that gender mainstreaming is taking place more effectively at regional as against central government level. The study of developments taking place in the Andalusian and Basque regions reveals that these regional executives are pioneering the introduction of gender mainstreaming structures and practices, such as gender budgeting in the Basque Country and the setting up of a gender mainstreaming unit in Andalusia. In general, respondents in those regions were keen to point out that they are making more progress in the area of gender equality policy than central government. It is worth noting, however, that the institutional set up with regard to gender equality, the policy culture and the positioning of civil society groups in relation to gender were found to be rather similar in both regions to those at central government level. This indicates the presence of certain facilitators. Among the facilitators identified by respondents are a stronger commitment to gender equality on the part of the political parties in power, the smaller size of the executives and hence a more fluid intra-governmental collaboration and coordination, and tighter links between regional government and civil society organisations as compared with national level.

### **3.2.4 EU and national policy**

Respondents focused their comments on the links between EU and national policy around two main themes: the prevailing understanding of the problematic and the reaction at national level. In relation to the former, a good number of respondents criticised how the problematic of gender equality and inequality has been conceived by the EU. On the one hand, there was the perception that the approach in the EU has been dominated by an equal rights framework. Apart from this, the promotion of gender mainstreaming, on the part of the EU, as the main approach to gender equality was also criticised by respondents.

On the matter of how the EU approach is viewed by the main actors and institutions associated with gender equality in Spain, the response was rather mixed. In general, respondents stated that the EU policy and approach to gender equality has quite a favourable reception in their respective institutions and organisations. That said however, a significant number of respondents expressed a great deal of discontent, especially in relation to recent developments in the EU. In particular, these respondents were critical of the EU for having taken a general ‘turn to the right’. Specific criticisms were also made. For example, mention was made of the fact that the rise of gender mainstreaming has been accompanied by a (perceived) systematic cutting back on and lowering of the profile of certain positive action programmes.

### **3.3 FRANCE**

Gender equality policy in France has undergone some developments over the past few years. However, in France the direction of gender equality policy very much depends on the political party that happens to be in government at the time and, hence, the continuity of such developments and their impact on gender equality policy in the long run are to be seriously questioned. Concentrating on developments over the past five years, it is possible to identify two clear patterns. One emerging pattern is the gradual articulation of a national gender equality policy which is underpinned by the principle of gender mainstreaming – a concept which in France is commonly referred to as ‘transversalité’. The second pattern is a gradual move of policy focus towards labour market concerns. One can question the extent to which these two main patterns indicate a lack of consistency at the heart of French gender equality policy.

The articulation of a national policy on gender equality underpinned by the principle of gender mainstreaming was contained in a strategy document which was launched on March 2004 - La Charte de l’Egalité, the Equality Charter. Over two-hundred pages in length, it spells out the key objectives for the future of gender equality policy in the country organised around five priority themes: parity, equality at work, respect for human dignity and lifestyle choices, work-life balance and solidarity with European and international organisations. Two novel elements of this policy are, first, its transversal approach, involving all departments of the administration and cutting across different policy domains and, second, its partnership approach, involving a wide range of actors or stakeholders from the public, private and voluntary sectors. These two elements signal a commitment to the central tenet of gender mainstreaming which is that responsibility for gender equality should not reside exclusively in the hands of dedicated gender equality agencies but should be a concern for everyone. They also represent an important departure from a tradition of gender equality policy in which responsibility for such matters has been

concentrated in the hands of the Secretariat for Women's Affairs and where social dialogue and participation in this area of policy has been, in general, quite limited.

Despite the significance of the Equality Charter as a step towards the introduction of a gender mainstreaming approach in France, the transformative potential of this policy depends on how it is to be implemented. Given the recent launch of the Charter, the French case study was not in a position to provide any assessment of its impact on gender equality policy as a whole. Nevertheless, an analysis of a similar venture in the domain of education can provide some clues as to the principal trends in gender equality policy in the country, as well as the main obstacles and facilitators in the introduction of a gender mainstreaming approach in the French context.

The Convention for the Promotion Equal Opportunities between Women and Men in the Education System (launched in 2000) represents the most important attempt to date to integrate a gender perspective into education policy in France. This policy is quite novel in a number of respects. First, it involves several government ministries - five ministries plus the main government agency for gender equality<sup>7</sup> apart from other public authorities at the regional level and voluntary associations – which is indicative of an awareness of the complexity of the issue of gender inequality in education and the need to involve all relevant stakeholders. Secondly, it represents a move from existing policy which focused exclusively on girls to one that focuses on both girls and boys. Finally, this policy aims to go beyond a concern with career choice for girls and similar issues that are labour market related and instead focus on the roots of gender inequalities in society, such as gender stereotyping and the nature of gender relations from early on in life.

However, despite the innovative appearance of this policy, a closer analysis of its implementation reveals important gaps between rhetoric and practice. In the first place, there is evidence that the involvement of the voluntary sector in the design and delivery of this policy has been negligible. Secondly, despite the rhetoric about moving beyond labour market objectives, the main measures that have actually been implemented concern the career choice of girls, while measures concerning gender stereotyping and gender relations have been given a much lower priority. Thirdly, the discourse on gender mainstreaming did not lead to the systematic integration of a gender mainstreaming focus on policy within the domain. Instead, most activities carried out in relation to this policy were limited to the implementation of specific measures directed at both girls and boys. Such a degree of distance between rhetoric and practice in the implementation of the Convention points to: a) a lack of clarity in relation to the objectives of policy, b) a lack of knowledge about the concept of gender mainstreaming and its methods, and c) a lack of a genuine political commitment to the implementation of a gender mainstreaming approach.

A second clear pattern emerging from French policy developments over the past five years is a very strong focus of gender equality policy on labour market issues. This is evident not only in the objectives of policy (as testified by the contents of both the Convention and the Charter) but also in the institutional re-arrangements carried out by the current government in relation to gender equality as soon as it gained power. Thus, following the elections in 2002, the new government replaced the post of Secretary of State for Women's Rights (created under the Jospin government in 1998) by that of Minister Delegate for Parity and Equality at Work. Thus, 'parity' and 'equality at work' clearly constitute the two main

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<sup>7</sup> Since 2002 this is the Women's Rights and Equality Unit.

priorities of the sitting French government in relation to gender equality policy, at the expense of issues concerning the private sphere such as, for example, sexuality, reproduction and domestic violence, or issues to do with the cultural roots of gender inequality such as gender stereotyping.

### **3.4 GREECE**

Gender equality in Greece became part of the public policy debate after the Constitutional Revision of 1975 in which formal equality between the sexes was launched. The socialist party came in power for the first time simultaneously with Greece's accession in the EC in 1981 and initiated public gender equality policies. Satisfying demands of the women's movement (regarding modernisation of the Family Law) and complying with EC legal framework (regarding equality in the labour market) were the two major concerns of PASOK Government during the 1980's. In the 1990s, active policies in favour of women and gender equality were boosted by Community Support Framework (CSF) funds. Labour market and education policies were most influenced by prerequisites of gender mainstreaming. Such strong influence from the EU has shaped gender equality policy in Greece in two distinct ways. On the one hand, it has facilitated the introduction of specific actions towards women as well as new policy making tools and techniques that are necessary to implement a gender mainstreaming approach. On the other hand, because these initiatives are being implemented within the framework of EU economic priorities, there is only a narrow margin for innovation at the national level.

Two institutions were created in view of developing equality policies, the General Secretariat for Equality, a political body and the Centre for research for gender Equality (KETHI), an implementing independent body. Formal contacts with women's NGOs were established in monitoring mechanisms of EU funding, whereas ad hoc consultation with the civil society depended on initiative by political leaders. Overall outcome of gender equality policies was largely shaped by two opposing factors: the weak understanding of gender mainstreaming methods and tools by policy makers and the high pressure by women politicians and feminist academics and experts. Women's organisations were oriented mostly to institutional demands (Constitutional Reform, legislation for domestic violence etc), as they were not sufficiently equipped to influence policies shaped around EU technocratic rules.

#### **3.4.1 Education policy**

The first case study showed that the process linked to the integration of a gender dimension in the CSF funded education programme - EPEAEK<sup>8</sup> - provides a very clear illustration of dynamic of EU influence. Thus, implementation of this programme has brought about the introduction of novel tools and techniques for gender mainstreaming such as gender-sensitive indicators, gender impact assessment practices, disaggregated statistics, as well as the involvement of a wide network of actors in the policy process. These new elements are quite innovative, especially in a country where the policy culture is resistant to a technical style of policy making and social dialogue and participation have traditionally been quite

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<sup>8</sup> Nowadays education policy is developed within the EPEAEK framework (Operational Program for Education and Initial Vocational Training). This is a venture funded jointly by the state (25%) and the EU under the Community Support Framework (75%). It has since 2001 has entered its second phase. In line with EU guidelines, according to which a gender dimension should be integrated into the programme, EPEAEK II includes a gender dimension in four of the six axes of the program, in the form of either positive action (Axis 4) or mainstreaming (Axes 1,2 and 3).

low. However, in stark contrast to innovation in policy-making techniques and actors' participation, the overarching objectives of these programmes need to be in line with the economic objectives set by the EU. Thus, in order to meet EU eligibility criteria, the gender equality initiatives funded through EPEAEK had to be designed so as to relate to the needs of the labour market.<sup>9</sup> Such dependency on the EU leaves little margin for the design of a genuine gender equality policy at national level, one for example that aims at combating the structural and cultural roots of gender inequalities.

### **3.4.2 Social Protection and Tax policy**

The second case study conducted in Greece has demonstrated processes of changes in more longterm policies, that were not directly depended on immediate funding and deadlines. Reform of social protection system was more an economic necessity than an EU directive. Feminists who worried about persisting inequalities in the existing system provided impulse for change in a bottom-up approach. They requested egalitarian changes (age of retirement etc) that risked to have immediate negative results for some women, although there would be counterbalanced by long-term benefits. Transitional remedies would require major transformation of social infrastructure availability, family arrangements and tax system restructuring. The lack of political will to proceed to such changes hindered gender mainstreaming in social and tax protection reform.

### **3.4.3 Effects of gender equality policy**

An analysis of the process of integration of a gender perspective into education policy and social protection reform as it relates to gender equality issues, reveals a number of features of Greek gender equality policy – and, more generally, of Greek policy culture and tradition – which constitute important obstacles to the implementation of a gender mainstreaming approach. The first such feature is a lack of commitment to gender equality policy on the part of the Greek government. In Greece, gender equality policy, originating from the EU, is tolerated rather than embraced. Such a lack of commitment is revealed by our research, first, in reported cooperation difficulties between government ministries and the main governmental agency with responsibility for gender equality (General Secretariat for Equality) and its main advisory body (KETHI) in the delivery of gender equality policy in the education domain. This difficulty is connected with a resistance on the part of these ministries to have other parts of the administration involved in affairs that they consider their province. Given that the implementation of gender mainstreaming requires the joint involvement and cooperation of different units and levels, this poses a serious obstacle to the implementation of such an approach. Secondly, a lack of commitment to gender equality on the part of the government is also revealed by the fact that the participation of the General Secretariat for Equality in policy processes that are relevant to gender, such as EPEAEK or the pension reform, is limited. This suggests that gender equality issues are quite low on the agenda of priorities of the Greek ministries, something which translates into a lack of depth in the integration of gender equality into the mainstream of policy.

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<sup>9</sup> For example, the overarching objectives of EPEAEK II with respect to gender are to “facilitate the integration of women in the labour force, eliminating discrimination against girls in the education community through the sensitisation of schoolteachers and mainstreaming gender equality in ... curricula contents and professional orientation courses” (*EPEAEK II Program Supplement*, 2000:272, available at [http://195.167.92.227/epeaek/el/a\\_2\\_2\\_3.htm](http://195.167.92.227/epeaek/el/a_2_2_3.htm))



A second feature revealed by the processes involved in the implementation of EPEAEK and the pension reform is the marginal role played by the voluntary sector in the design, implementation or evaluation of gender-sensitive policies. It is highly illustrative of Greek policy culture that, during the pension reform process, the proposals submitted by women's associations on measures relevant to gender on the draft pension legislation were not taken into account by the government until the intervention of an MEP, Anna Karamanou, who organised a conference on the reform of the social security system and equality between sexes. The crucial role played by this MEP in bringing together governmental and non-governmental actors and initiating a public debate on gender and pensions reveals the important role of individual actors in Greece in influencing government policy. This poses a serious obstacle to the implementation of gender mainstreaming since the inclusion of women's groups in policy processes is not institutionalised but depends on the commitment of high-profile individual women to gender equality.

#### **3.4.4 EU and national policy**

Exploring EU high significance in Greek public policy making on gender equality necessitated additional research in major policy documents since Greece's accession in the EU in 1981. The aim was to analyse national barriers limiting EU influence, as well the windows of opportunity that opened but not properly used in national policy making. The research highlighted the conditions under which EU guidelines and directives were either successfully implemented or only bureaucratically applied with no concrete results. Respondents and policy documents analysis suggested that public policies on gender equality were too multi level processes involving too many diverse actors to follow patterns and strict plans from the beginning up to the end of policy cycle. Persistence of objectives and vigilance was necessary in all phases of policy cycle, as male dominated actors and institutions tended to deviate instructions, to misuse funds and to mislead genuine interests in gender equality. In the good example of education policy, all respondents agreed that there was quite a favourable policy environment in both EU (management, officials, politicians) and Greek level (academics, politicians, civil servants).

### **3.5 IRELAND**

Relevant policy in Ireland is best seen as consisting mainly of two components. One is the legislative framework, which is mainly organised around two recent pieces of legislation: the *Employment Equality Act, 1998* and the *Equal Status Act, 2000*. The second is gender mainstreaming of the National Development Plan 2000-2006. Since part of the funding for the National Development Plan comes from EU Structural Funds, there is a requirement to mainstream the relevant funds. Towards this end, the Plan made provision for a number of new initiatives, including the setting up of a Gender Equality Unit at the Department of Justice, Equality and Law Reform (the department with the general remit of equality).

There are two main pillars of the institutional architecture on gender equality in Ireland. The first is the relevant government ministry charged with responsibility for a variety of equality-related issues: the Department of Justice, Equality and Law Reform. Within this Department, the Gender Equality Division plays the key policy role. The second pillar of equality is the Equality Authority, an independent statutory body, established in 1999, with a mandate to eliminate discrimination and promote equality of opportunity. Outside government, the National Women's Council of Ireland also plays a key role. This is a non-governmental organisation representing women organisations and seeking to articulate a



consensus view from among its members and to influence the governmental agenda. Social partnership has also played a key role. The Irish process of social partnership is a broadly inclusive one, incorporating women's interests through the National Women's Council. However, it should be noted that the women's representatives did not approve of the most recent agreement, agreed in 2003, and as things stand now they and a number of other organisations have absented themselves from the social partnership process.

There have been two main trends in recent policy in Ireland. The first is a move to focus on equality in general rather than gender equality specifically. The second notable feature of recent gender equality policy in Ireland has been the introduction of both gender mainstreaming strategies and positive action measures, mostly within the framework of the National Development Plan.

### Education Policy

A number of developments taking place in Irish policy and legislation in recent years have put gender equality on the agenda of education policy. In relation to legislation, two laws – the Education Act, 1998 and the Equal Status Act, 2000 – were passed to legally enshrine the principle of equality in the education system, paving the way for a number of initiatives aimed at the promotion of equality in schools. Apart from this, EU regulations in relation to the Structural Funds have led to the creation of new structures aimed at the integration of a gender perspective into all areas of the Irish education system. One such structure is a Gender Equality Unit at the Department of Education and Science, which has the remit to integrate a gender dimension into all the Department's services, actions, programmes and measures for children and adults, at all levels. The role of this Unit is mainly a supportive one, that is, it does not have the power to compel schools to incorporate a gender mainstreaming policy.

Despite recent developments, education policy as officially formulated has a strong focus on equality in general rather than gender equality, whereby equality is mainly understood in terms of social inclusion and disability concerns. By contrast, gender equality does not appear to be central to the policy domain and the actions that have been taken leave structural issues of gender inequality largely unaddressed. Thus, the new policy has shown a primary concern with the preservation and reproduction of the established culture of schools, the majority of which are denominational. In sum, the possibility of conflict between the established culture and the transformative character of gender equality objectives does not receive due consideration in the new policy developments.

### **3.5.1 Effects of gender equality policy**

In general, the Irish actors interviewed regard gender equality in relatively complex and multi-faceted terms. While most regard themselves as having a clear understanding of gender, they do not generalise this to governmental decision makers at large, and are quite pessimistic about and rather critical of the views on gender that prevail at the highest levels. There are two issues involved here: the extent to which a gender analysis has penetrated decision making circles and the extent of commitment to addressing gender among the higher echelons. Both combine to reduce the legitimacy of gender inequality as part of the contemporary policy problematic.

It is the consensus opinion among respondents that a range of approaches to gender equality are in place in Ireland. Thus, the legislation that exists is seen to draw mainly on

an equal treatment approach while a positive action approach is seen as the dominant approach in the country at the present time. The main evidence of gender mainstreaming was usually taken to be the existence of a central unit with responsibility for mainstreaming as well as a second unit at the Department of Education and Science. Other areas on which there has been a perceived level of gender mainstreaming activity are the commissioning of gender research, the use of gender-disaggregated statistics and the training of officials.

The interviews convey a strong sense that people working towards gender equality in Ireland adopt a pragmatic perspective, almost regardless of the conception of or approach to gender equality prevailing in policy. However, the general consensus of opinion is that, while gender is quite prominent in Irish policy discourse it is not as well developed or embedded in policy practice.

With regard to facilitators, state of the art and strong legislation is identified as one strength in the Irish setting. Another widely identified facilitator is social partnership. Thirdly, the EU is generally identified as a very significant facilitator of gender equality in the Irish case. A fourth set of facilitators identified by respondents is individual champions. Fifthly, the Gender Equality Unit in the Department of Justice, Equality and Law Reform was mentioned as a facilitator.

As for barriers, one of the most frequently identified barriers is lack of understanding and acceptance of the situation of women as being different to and more problematic than that of men. Secondly, respondents draw attention to the fact that patriarchy is deeply rooted in Irish society. Thirdly, there is the fact that systems like the civil service usually operate on the basis of the status quo which means that they are slow to take on board issues that might represent a challenge. Inertia and lack of political will is another barrier identified as is deficiencies in the content of gender equality policy. Here people make reference to the lack of a coherent strategy and plan of implementation. Another perceived problem or possible drawback with the existing approach is the question of the effects of broadening the definition of inequality to include eight other grounds along with gender.

### **3.5.2 Contribution to policy quality**

In relation to actors' participation, ready reference was made to the relatively inclusive national planning process which has existed in Ireland since the mid-1980s. Involving a range of voluntary sector NGOs, this is seen to have been, up to the recent past anyway, expansive in terms of who was involved and the range of issues considered. However, while respondents were generally complimentary about this process, there was a feeling that the meaning of consultation has changed in Ireland in recent years.

The general sense is that collaboration among actors has improved in recent years, especially among the agencies charged with progressing gender mainstreaming. However respondents feel that there are 'soft' and 'hard' domains of policy in regard to how receptive they are to collaboration on gender equality.

Respondents identify a number of add-on or generic benefits associated with gender equality. One benefit is in the evidence base of policy, which is generally seen to have improved. Here respondents make reference not just to the easier availability of statistics

and other kinds of information but also to a general recognition of the need for statistics and for policy to become more evidence based.

Opinion on whether developments in relation to gender have acted to improve the general process of policy making in Ireland is quite negative. This is because it is generally felt that gender equality as a policy objective, and gender mainstreaming in particular, has not been embraced by the top-level policy makers.

### **3.5.3 EU and national policy**

There is a wide consensus among respondents of the significance of the EU in the Irish case. However if 'linkages' are to be understood in terms of the closeness between the national policy profile and the EU approach, then Ireland cannot be considered to directly follow the EU approach. There are a number of senses in which this is the case. In the first instance, gender mainstreaming could not be said to be all that advanced in Ireland. Secondly, gender mainstreaming is not the dominant approach at present but is rather one of a number of approaches.

In general respondents feel that there is high degree of receptivity at national level to EU developments. Replies here also indicated that, while Ireland looked to the EU in the past to provide leadership, a dynamic has now been established at national level. This means that EU developments are filtered through the lens of what is happening nationally.

## **3.6 LITHUANIA**

Lithuania is an example of a country in transition from the formal equality politics espoused by the old Soviet regime to the version of liberal feminism espoused by the EU. In effect, this transition is a move from a policy that strictly focused on equality of treatment to a policy that tries to overcome the shortcomings of the old approach by focusing on equality of outcome.

This move has brought significant changes to Lithuanian equality policy in recent years. Under the Soviet regime, the principle of equality between Lithuanian women and men was enshrined in equal rights legislation. However, this type of instrument, while ensuring equality *de jure* did not result in *de facto* equality. With the country's accession to the EU (and the influence of other international bodies such as the UN), a number of instruments have been put in place with an aim of levelling the playing field between women and men. One such instrument is the National Programme on Equal Opportunities Between Women and Men (2002-2003). The Programme follows closely the model provided by the EU Community Action Programmes on Gender Equality, setting out a number of gender equality objectives in specific areas that are to be implemented by different government ministries. It also marks the introduction of a positive action approach in Lithuania, as it includes a set of specific measures targeted exclusively at women. The introduction of positive action has in turn required a full revision of the existing equality legislation. Thus, the Law on Equal Opportunities of 1998 introduced the concept of indirect discrimination as well as allowing for positive action. It also established the Lithuanian Equal Opportunities Ombudsman, with a remit to ensure that this legislation is properly observed.

A key theme emerging from the Lithuanian research is that these changes have been met with a significant degree of resistance, by government officials and the public alike. Such

resistance originates in the strong legacy left by the old Soviet regime, together with a powerful Catholic tradition that has been revived since independence. On the one hand, the ideology of the old Soviet regime still exerts a powerful influence on ideas about gender equality policy that are prevalent in the country. This is an ideology that focused on the emancipation of the proletariat, independently of their sex, and which entailed an approach to equality that was neutral and solely guaranteed through equal rights legislation. To such an ideological framework, positive action and positive discrimination are to be regarded with a high degree of suspicion since they are seen as contrary to the main thrust of that tradition of policy. Apart from this, the tradition of equal rights legislation as the main instrument for gender equality policy has also led to the widespread belief that equality has already been achieved and, therefore, that there is no need for positive action and related measures.

A second influential force shaping ideas about gender equality in Lithuania today is a Catholic tradition that focuses on conservative family values and espouses a traditional breadwinner/homemaker model of gender roles and gender relations. Such an influence has made an imprint on government equality policy in that gender tends to be framed within the confines of family policy. In sum, the prevalence of these contradictory influences on the consolidation of a national equality policy are creating important obstacles to the introduction of a gender mainstreaming/positive action approach in Lithuania, as well as creating great inconsistencies in the current objectives and direction of policy.

In the face of such a level of government resistance to the introduction of a gender equality policy based on the principles of positive action and gender mainstreaming, the women's movement has emerged as the main driving force behind the changes that have been recently introduced. Although the movement still suffers from a high degree of fragmentation, as well as lack of knowledge and skills, in recent years it has gained momentum. Taking the example of Sweden as the main model to follow<sup>10</sup> (as well as developments at the EU level), the Lithuanian women's movement is playing a key role in pushing for legislative and policy reforms, as well as introducing the concept of gender mainstreaming into the country.

### **3.7 SWEDEN**

Sweden has pioneered gender mainstreaming as the main approach to achieving gender equality in society. In doing so, the country provides a model to both the EU and the diverse European national and regional governments of the concept, objectives and methods of the approach. Gender mainstreaming in Sweden involves taking gender differences into consideration in all activities carried out by different sectors of society. This is achieved through systematic exercises of gender analysis in the design and delivery of all policies and services at different levels of governance. What it means in practice is that all public, private and voluntary organisations (for example, ministries, public authorities, private firms, voluntary associations and so on) become active participants in the attainment of gender equality in society. Although gender mainstreaming is the

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<sup>10</sup> The significance of the Swedish influence should be noted. For example, the Swedish 3R-Method for the integration of gender at the municipal level – a method which emphasises representation, resources and *realia* (which involves an analysis of why representation and resources are gendered in their distribution) – is being applied in Lithuania, in collaboration with the Office of the Equal Opportunities Ombudsman, the Swedish Municipal Association and the Lithuanian Municipal Association.

dominant approach, it is carried out in conjunction with other approaches to gender equality, in particular positive action.

An analysis of the Swedish experience of gender mainstreaming provides an invaluable insight into the requirements for the implementation of such an approach. Three broad requirements or conditions are especially worthy of note. The first is the vital role played by experts in making gender mainstreaming possible. This is an approach that necessitates significant conceptual and technical support in order to clearly define the objectives of gender mainstreaming initiatives and realise those objectives in practice. In other words, questions concerning the 'what' (what kind of a gender equal society do we want to achieve?) and the 'how' ('how are we going to achieve it?') are not automatically given by the approach and therefore need to be raised and articulated. Given this, the collaboration of experts at both national and regional levels of government constitutes a key element in the successful implementation of gender mainstreaming in the country. Moreover, the failure of the Swedish municipal level to effectively integrate a gender perspective into their institutions and practices – as found by the Swedish research - provides a telling illustration of what happens when the main actors involved in gender mainstreaming lack the knowledge and expertise necessary to implement that approach.

The second requirement concerns the need for a broad social consensus in relation to gender equality policy. Because the implementation of gender mainstreaming necessitates the involvement of a wide range of actors, this approach would not be possible in a society that is divided in relation to the level of political commitment that the actors involved are willing to give to gender equality or the political meaning that is conferred on the concept. An important facilitator of gender mainstreaming in Sweden is the fact that the society enjoys a high level of consensus across the political spectrum in relation to these matters. Such a level of consensus, however, is not free of gaps, as revealed by the difficulties that the country is experiencing in integrating a gender dimension at the municipal level. Thus, a key finding of the Swedish research is that the introduction of gender mainstreaming into a decentralised public service which is in the hands of the municipalities - like education - encounters significant obstacles. This is linked to a lower prioritisation of gender equality issues on the part of municipal officials in the education domain as compared with officials in the domain at central government level. Overall, those difficulties underline the importance of a broad consensus in the effective implementation of a gender mainstreaming approach.

A third condition for successful gender mainstreaming pointed out by the Swedish case is the need for tight mechanisms of coordination among the different bodies involved in the implementation of a gender mainstreaming approach. Contrary to the type of interventions that are characteristic of a positive action approach (which tend to be highly specific and limited to particular domains or institutions), gender mainstreaming requires a high degree of coordination since this approach does not follow a strict sectoral logic. Hence the achievement of gender mainstreaming objectives (e.g., tackling gender stereotyping) involves the collective effort of different bodies, working in different sectors or policy domains. Indeed, most initiatives in gender mainstreaming examined in the Swedish research involve the cooperation of different departments of the central administration, together with other authorities at the regional and municipal levels and, to a much lesser degree, the social partners (e.g., voluntary groups, trade unions, private firms, among others). Coordination among all of those bodies in the implementation of those gender



mainstreaming initiatives is provided by the Division of Gender Equality, a dedicated gender equality body within the central administration.

In sum, the Swedish example provides a model of gender mainstreaming, as well as a set of lessons about what works in the implementation of the approach. The Swedish example also provides a point of reference, not only for the defenders of gender mainstreaming but also for its detractors. Thus, while the depth of integration of gender in the different domains may be applauded by many, there are other elements inherent in the Swedish experience which may be a point of criticism. One concerns, for example, the low profile of the voluntary sector in the delivery of gender equality in the country. One of the reasons for this is that, as indicated above, gender equality enjoys a high level of consensus across the political spectrum - a factor that renders the non-governmental sector somehow redundant in pushing forward novel developments or initiating public debate.

### **3.8 UNITED KINGDOM**

An identifiable gender equality policy has only emerged in Britain over the course of the last six years. However, this policy remains entangled with other sets of policies and is firmly embedded within a vigorous project to reconstitute the state's welfare arrangements. Under the rubric of 'Modernising Government' a programme launched in 1999, state departments are required to draw up 'Public Service Agreements', specifying their particular programmes of action, plans and activities, complete with concrete, time-bound, and quantifiable targets. It is from one such Public Service Agreement, drawn up by the Department of Trade and Industry, that the first official, measurable objective on gender equality emerged, with explicit targets and measures functioning as criteria of success and/or failure, which are detailed in the document *Delivering on Gender Equality: Supporting the PSA Objective on Gender Equality 2003-2006*, published in June 2003.

The lead agency for promoting and carrying forward gender equality policy is the Women and Equality Unit within the Department of Trade and Industry, headed up by two government Ministers for Women. Other key institutions within the gender equality machinery are the Equal Opportunities Commission and the Women's National Commission. The former is centrally important as a vigorous advocate of change and reform. The latter plays a role as an intermediary between a diverse network of women's organisations and central government, functioning in an advisory capacity as a recognised representative agency for women's interests.

In recent years, there has been an extensive debate over the future of gender equality policy and the role of the Equal Opportunities Commission, with specific attention given to the proposal to found a new equality institution with over-arching responsibility for an extended generic equality agenda. This institution would absorb the functions of the three major commissions for gender, race and disability, and would include additional equality 'grounds' of religion/belief, age, and sexual orientation, whilst also acting as a supporting institution for human rights.

Overall, two processual trends appear to be evident:

- the slow condensation or 'crystallisation' of a defined policy on gender with an autonomous identity;
- the shift towards the assimilation of gender equality policy as an integral component of a re-invigorated generic equality policy.



### Education Policy

In English education policy, two particular issues in relation to gender equality have led to specific programmes of action on the part of the government. These are boys' under-achievement in school and gender stereotyping in relation to subject and career choice. In this section the main government programme to tackle gender stereotyping in relation to subject and career choice will be described and analysed.

The Strategy for Women in Science, Engineering and Technology, launched in 2003, forms part of a wider policy agenda aimed at developing the supply of science, engineering and technology skills with a view to improving productivity in the UK. Gender stereotyping, in other words, constitutes an issue of major concern only insofar as it leads to a shortage of valuable skills, which in turn affects the national economy. This exemplifies an exceptionally strong tendency to regard gender equality in instrumental terms, not as an end in itself but as a means of pursuing objectives largely extrinsic to gender equality policy. Structural and cultural issues remain untouched in current policy and the focus on freeing up the female labour supply suggests that gender equality policy in the UK is not so much a reflection of particular understandings and approaches to gender equality as it is a reflection of a specific labour market policy devised in the context of an overarching macro-economic policy.

One of the main barriers to the incorporation of a gender dimension into education policy in Britain is the lack of a coherent policy agenda on gender equality in this domain. An analysis of policy documents and interview material point toward two possible reasons for this. First, the fact that there is a public duty on race equality and not one on gender is pushing government departments and other public authorities to turn their attention to the former at the expense of the latter. Second, the lack of a gender equality agenda is linked to the fact that gender equality does not figure among the key objectives of government policy. As a result, gender equality as an objective remains subservient to objectives of productivity and economic growth.

#### **3.8.1 Effects of gender equality policy**

One of the most striking points to recur in numerous interviews is that there is no single shared understanding of gender equality and inequality in Britain. Indeed, according to a number of respondents, it is not even possible to identify something like 'the government's view' on gender. Rather, a multiplicity of understandings of equality can be found within government, demonstrating varying levels of development and sophistication.

Although there is not a shared view of gender inequality among key actors, respondents pointed to three general trends in the thinking about equality. The first is a gradual shift in the thinking on equality, which moves from a specific focus on women and sex to a less determinate focus on gender. The second trend is a shift from a conceptualisation of equality purely in terms of countering discrimination to one that views equality primarily in terms of equality of opportunity. A third trend detected by respondents was a quiet shift away from a focus on women's issues and inequalities towards a more generalised concern with equality as generic, as exemplified by plans for the creation of a single equality body that amalgamates the existing three equality commissions.

In relation to approaches to gender equality being pursued, it emerged very clearly from the interviews that actors have no strong preferences regarding any one particular approach and that a form of pragmatism dominated. Rather than advocating a preferred approach, the majority of respondents focused on the perceived gaps in existing approaches. In this regard, respondents broadly agreed on the need for more legislation as a key mechanism for gender equality policy. At the same time, they also regarded the development of a gender mainstreaming approach as a necessary mechanism, especially in that it serves to 'fill the gaps' left by legislation. In this sense, both approaches were seen as complementary. Respondents were more reticent about positive action, an approach which was associated with female quotas in government and political parties and hence understood as 'positive discrimination'.

The majority of respondents were quite positive about gender mainstreaming, although some voiced major reservations. First, some respondents expressed caution about the government's endorsement of the gender mainstreaming approach and the fact that it is a policy that lends itself quite easily to (mis)appropriation.. Secondly, concerns were raised about the potential of the gender mainstreaming approach to conceal gender inequality as a problematic that is primarily about women.

In relation to the impact of gender mainstreaming on the intensity of policy, the majority of respondents agreed that this approach is at such an embryonic stage in British policy that it is somewhat premature to make any evaluation in this regard. Despite a lack of 'visible' effects, respondents were nonetheless keen to point to existing gaps and barriers, as well as facilitators, in the process of integrating gender mainstreaming into policy.

Regarding barriers, respondents mentioned, on the one hand, an excessive reliance, on the part of different policy-making bodies, on the expertise of equality institutions to deliver on gender equality. A further barrier is the potential for an overtly instrumental use of gender mainstreaming. Other obstacles acting against the integration of gender in policy were also mentioned, such as a lack of willingness, awareness and expertise, complacency to free-market obsession and "post-modern irony".

Regarding facilitators, there was wide agreement among respondents that the New Labour government has been the main facilitator in the development of gender equality having introduced this series of reforms since 1997. A few respondents also mentioned some specific initiatives that were acting as facilitators, such as a cross-departmental pilot project on gender analysis of expenditure.

### **3.8.2 Contribution to policy quality**

All respondents, irrespective of their institutions or organisations, provided a very positive assessment of actors' involvement in gender equality policy. Most respondents subscribed to the view that there have been important improvements in relation to: a) the number and range of actors that are involved in gender equality policy, especially inside government and b) the degree of involvement and participation of actors. As regards the former, respondents mainly referred to the establishment of new structures within government with a specific gender mainstreaming remit such as the Women and Equality Unit at the Department of Trade and Industry, together with the Women's Ministers and the Cabinet Sub-Committee on Equality. Regarding the latter, respondents agreed that involvement and participation has been considerably enhanced since 1997, something which is seen as part

of the general culture of participation and social dialogue that has been favoured by the current government.

However, despite the positive assessment of actors' involvement, respondents also showed a high degree of caution in their assessment of the potential impact of such heightened culture of consultation and participation. One respondent even intimated that such a culture is just 'dressing' – the way the government likes to see itself and to be perceived by others.

In relation to collaboration among actors, both inter- and intra- institutional collaboration is widely regarded as having greatly improved since the formation of the New Labour government in 1997. Perhaps the most salient issue emerging from respondents' evaluations of intra- and inter- institutional collaboration is the relative lack of communication at a governmental level between Whitehall and the devolved governments in Scotland, Wales and Northern Ireland.

Overall, respondents generally agreed that changes introduced by the New Labour government in relation to gender equality have contributed to a moderate improvement of the quality of policy. However, they insisted on pointing out that this type of assessment needed to be put into perspective. Thus, after a barren period of gender equality policy during conservative rule, even minor improvements tend to be regarded as significant. Respondents emphasised particular improvements in respect of data and information, inclusiveness of policy, clarity of policy objectives and resource allocation.

### **3.8.3 Developments at regional level: Scotland**

The research on the UK examined developments in equality policy taking place in the devolved administration of Scotland, as well as those taking place at central government level. It became clear that the devolutionary process that has taken place in Scotland since 1998 has been crucial to the development of a distinctive gender equality policy. Moreover, this is a policy that appears to be somewhat more advanced than that being pursued at central government level, if we compare the relative level of progress in relation to institutional set up, policy commitments and policy implementation to that undertaken in central government to date.

Respondents in Scotland were quite positive about the developments in equality policy that have taken place since devolution. In particular, they pointed to three elements that characterise the approach taken and that can be considered as key for its success. The first is a broad consensus on the need to make equality one of the founding principles of both the Scottish Executive and the parliament. Secondly, equality mainstreaming constitutes the main approach to equality policy. And thirdly, the implementation of this mainstreaming of equality policy is based on a partnership approach, involving a very wide set of actors and stakeholders.

When prompted, respondents pointed to a number of factors that play a role as facilitators of equality policy in Scotland. The first is devolution, without which, in their view, those policy developments in equality would not have taken place. A second facilitator mentioned by respondents is a strong tradition of civic republicanism in Scotland. Apart from this, other facilitating factors were also cited, such as the small size of the Executive – which means that everybody knows each other – and a strong voice on the part of the Scottish women's movement at the time of devolution.

#### **3.8.4 EU and national policy**

Respondents' opinions on the linkages between EU and British gender equality policy were very mixed and, in some cases, contradictory. There was also considerable confusion about the EU and a pronounced reliance on popular stereotypes when discussing it. Many respondents utilised stereotypes to account for perceived differences between the UK and the EU, most strikingly in the uncritical appropriation of the US/UK 'market individualism' vs. the EU's 'social market' model. Such use of stereotypes prevented respondents from constructing an informed or articulate criticism of the EU approach to gender equality, apart from rather superficial self-congratulatory statements such as we are doing better in Britain. Furthermore, it tended to reveal a pronounced lack of informed judgement on their part.

Of all the topics covered in the interviews that of the EU was the one about which respondents' opinions were most dependent on the institution they represented. Those working in quangos and NGOs tended to hold very similar views but to be somewhat at odds with those of government-based interviewees. The main points of divergence concerned respondents' perceptions of the differences between the approaches taken by Britain and the EU to gender as well as the influence of the EU perspective on British policy.

## Chapter 4

### Main findings of the comparative analyses

**In this chapter, the main findings of the comparative analyses – firstly between the case study countries, and then between national and European levels – are presented.**

#### 4.1 COMPARISONS BETWEEN THE COUNTRIES

##### 4.1.1 Key Features and Constituents of Gender Equality Policy

This comparative analysis of gender equality policy in the eight countries opens with the matter of the general state of gender equality policy in each country, as well as its main constituents. In framing the discussion around this matter, this first section examines the universe of variation with respect to the following factors:

- Objectives of gender equality policy;
- Main target group;
- Principal medium of gender equality policy;
- Key institutions with responsibility for gender equality policy;
- Main actors involved.

The aim of this section is to provide a general picture of the degree of variation in the current state and constituents of gender equality policy in each of the countries under study. This comparative analysis will, in turn, provide a general framework for interpreting variation in relation to other key questions raised in this comparative part of the project, such as those concerning the progress in relation to gender mainstreaming, the different ways in which this approach is being implemented, as well the policy outcomes associated with it.

In relation to the objectives of policy, it is important to note that most countries – with the exception of Sweden – lack a coherent and clearly defined gender equality policy at a general level. While most countries have a programme or plan articulating a national equality policy the overarching objectives of such policy tend to remain undefined. In the absence of overarching objectives of gender equality policy, the objectives formulated tend to be highly specific and circumscribed to certain policy domains. In sum, such objectives bear no connection either among themselves or to a set of more general gender-related objectives.

It is not uncommon to find programmes where objectives in one domain show, for example, a high degree of awareness of structural aspects of inequality while in a different domain such awareness is completely absent. Variation in the objectives of gender equality policy across domains is strongly determined by the tradition and trajectory of gender equality policy in each domain. Thus, for example, some domains have a long history of political commitment to gender equality objectives while others are only starting to be aware that gender issues are relevant to them.<sup>11</sup> It is also the case that one finds specific

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<sup>11</sup> Although some degree of variation in gender equality objectives across the different domains can be observed in all countries – including those with a more compact gender equality policy like Sweden – it is most evident in those countries where the establishment of dedicated gender equality units within the government administration is a recent development, Greece, Ireland and the UK

objectives in national programmes of gender equality often connected to other general objectives (for example productivity) that have no connection whatsoever with gender equality. The formulation of specific gender objectives with the aim of serving more general productivity objectives is quite common in all of the countries under study but is especially marked in the UK. Apart from this, one finds that gender equality objectives are also often designed to meet more general social inclusion objectives. This is especially marked in Ireland.

Moving from general equality policy to gender mainstreaming in particular – an approach that, to a greater or lesser extent, is in the process of being introduced in all the countries under study – a significant degree of variation exists in the objectives of this approach. While in some countries, like the UK, the banner of gender mainstreaming tends to be used to meet more general labour market or productivity objectives, in other countries (like Sweden) gender mainstreaming is regarded as a way of tackling the cultural and structural roots of gender inequality in society. In a third set of countries, however, gender mainstreaming is a policy end in itself. This is especially the case in countries where the influence of the EU has been strong, such as Belgium, Greece and Ireland.

Concerning the target group, in the majority of countries (with the exception of Sweden) gender equality policies are still overwhelmingly targeted exclusively at women, although there is clear evidence of a move, albeit slow, from women to gender.<sup>12</sup> In any case, we can observe a significant gap between rhetoric and practice in relation to the target group of gender equality policies in many of the countries under study. Thus while the use of the terms ‘gender’ or ‘women and men’ are quite widespread in policy discourse, further examination reveals that actual policies are targeted at women only. There is also evidence in some countries that the new, more neutral, terminology of ‘gender’ (a terminology which is in many cases imported from the EU and other international bodies) is preferred by government officials to the old terminology of ‘women’, since it serves to conceal potentially unpopular feminist and positive action connotations.

There is also important variation among countries with respect to the medium of policy, a variation which reveals the variety of ways in which gender equality policy can be formulated and implemented. The four most common media of policy found in the eight countries under study are:

- the elaboration of national plans for equality;
- the introduction of equality legislation and its enforcement;
- systematic analyses of policies from a gender perspective (e.g., gender impact assessment);
- mechanisms of consultation with all relevant stakeholders.

As will be seen over the next sections, these are all common media for the integration of gender mainstreaming while other approaches to gender equality (such as equal treatment and positive action) tend to be characterised by a smaller range of media or policy means.

A common medium of gender equality policy is the elaboration of national plans for gender equality. Typically, these are governmental plans that specify a number of objectives and measures in relation to gender equality to be implemented in different areas.

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<sup>12</sup> Note, however, that in some countries the move from women to gender is understood as the need to introduce specific measures for boys or men.



These plans tend to be quite similar in their structure and organisation, since many follow very closely the model set out by the EU Framework Programmes on Gender Equality, in which objectives are organised around a number of priority themes.<sup>13</sup> This is especially the case for the Greek, Lithuanian and Spanish plans. There are, nonetheless some variations, with other plans (such as for example the Belgian Strategic Plan for Equality Affairs) organised around ministries rather than themes. Despite these similarities in the structure of the plans there are important differences in relation to their status and content.

First, a distinction needs to be made between plans that represent a collective effort to define the objectives and the measures to be implemented by the different government bodies and those that are a post facto collection of measures undertaken by the government in relation to gender equality. Examples of the former include the equality plans operating in Belgium, France, Lithuania and Spain. The UK government document *Delivering on Gender Equality*, which is little more than an exercise of putting together a set of different gender-related targets previously set by different departments as part of the process of modernisation of the civil service is an example of the latter. Similarly, the Irish National Plan for Women, although structured along the same themes set by the current EU Framework Strategy on Gender Equality (2001-2005), is nonetheless a summary of the work done by the government to date in relation to women, rather than a plan of future action. The Greek National Programme for Gender Equality also resembles an exercise of putting together different initiatives rather than a genuine governmental plan of action. Often, the purpose of such exercises of drawing a post facto plan is to comply with CEDAW or EU requirements.

Secondly, there are significant variations in relation to whether equality plans are institutionalised or are more a type of sporadic initiative (put forward by governments from time to time) in response to the social and political conditions prevailing at a particular point in time. For example, plans may arise in the context of a public debate on gender or they may be facilitated by a government especially sympathetic to gender equality issues. In the current study, the only country where equality plans are firmly institutionalised is Spain where successive governments have launched plans on a regular basis since the late 1980s, independently of socio-economic or political factors. As a contrast consider the equality plans that have recently been launched in Belgium, France and Lithuania which constitute a once-off event, tied to circumstances such as, for example, a sympathetic government in the context of a public debate on equality (as was the case with the French plan during Jospin's mandate), the introduction of new legislation requiring each government department to report to parliament on progress on gender equality (the case for the Belgian plan), or a need to adjust to European and international requirements on gender equality policy upon entry to the EU (the context of the Lithuanian plan).

Finally, there is variation in relation to the actual content of the plans. Thus, while in some countries plans are quite specific, containing objectives and measures that are concrete (Belgium), in other countries the plans' objectives and measures are vague and lack substance (Spain).

The other most common medium of policy is gender equality legislation and its enforcement through equal opportunities ombudsmen or other monitoring mechanisms.

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<sup>13</sup> The current EU Programme is organised around five themes concerning: gender equality in economic life, equal participation and representation, equality in access to social rights, equality in civic life and combating gender roles and stereotypes.

Legislation is a medium used in all countries, particularly anti-discrimination legislation in employment and education. However, a number of countries are introducing equality legislation which extends beyond these traditional areas to cover a wide range of public services and other facilities. One of the best examples of this is the Irish Equal Status Act, 2000. Legislation on gender equality applying to the private sphere (e.g., against domestic violence) is also being introduced in a number of countries, such as Spain. Apart from being an important medium of policy in its own right, equality legislation can also provide a general framework for the development of gender equality policy. In some countries, legislation has allowed for the introduction of positive action programmes and measures (e.g., Greece and Ireland), while in others it has triggered the introduction of gender mainstreaming. One example of the latter is the Belgian law of 1996 mandating the government to report annually to the parliament on progress on women's situation activated the development of a pilot project on gender mainstreaming (Strategic Plan for Equality Affairs).

Gender analysis and mechanisms of consultation and participation constitute the two other main media of gender equality policy. However, these are mechanisms which characterise gender mainstreaming approaches to gender equality and, hence, are rarely used in countries where the dominant approach is either equal treatment legislation or positive action.

In relation to the nature of the institutional set up of gender equality, in all eight countries there is a specific government department, or unit, which is responsible for gender equality policy, either in relation to policy formulation or implementation. These institutions are normally attached to a particular government department or ministry and their functions are generally the promotion, monitoring and evaluation of gender equality policy. In other words, these institutions do not possess sanctioning powers and so cannot oblige any other department of the administration to implement such policy. In the countries under study the only gender equality institutions with sanctioning powers are the (gender) equality ombudsmanlike authorities, which offices are responsible for the enforcement of equality legislation through litigation procedures. This type of institution plays an important role in Ireland, Lithuania, Sweden and the UK.

Despite the commonalities in gender equality institutions, there is also a significant degree of variation. Such variation mostly concerns:

- a) The degree of autonomy of gender equality institutions from the department or ministry to which they are attached: In some countries these institutions enjoy a certain degree of administrative autonomy from the ministry to which they are attached, while in others they are just a unit within those ministries. Examples of the former include the Belgian Equality Institute, the French Women's Rights and Equality Unit, the Spanish Women's Institute and the UK Women and Equality Unit. Examples of the latter include the Greek General Secretariat for Equality, the Irish Gender Equality Section (within the Equality Division of the Department of Justice, Equality and Law Reform) and the Lithuanian Office on Women's Issues.
- b) The status and position of the head/director of the institution: In some countries gender equality institutions are headed by a dedicated (gender) equality minister (or

minister for women). This is the case in Belgium, Sweden and the UK.<sup>14</sup> In the other countries, however, these institutions are headed by the minister of the department of which they are part (e.g., Minister of Labour and Social Affairs in Lithuania and Minister for Justice, Equality and Law Reform in Ireland). There is also variation in relation to the status of dedicated gender equality ministers. Thus while in some countries these are cabinet ministers (Belgium, Sweden), in others they are junior ministers or ministers of state (UK).

- c) The position of the institution within overall government: In some countries gender equality institutions are attached to a central ministry, such as the Ministry of Industry, Employment and Communication (Sweden) while in other countries these institutions are located much more at the periphery (Ministry of Interior, Public Administration and Decentralisation in Greece, Ministry of Labour and Social Affairs in Lithuania and Spain).

These are not the only relevant gender equality institutions in the countries under study. The role of the Gender Equality Ombudsmen in some of these countries has already been mentioned. Apart from this, in some countries the central government institutions are assisted by support units or research bodies. The typical role of the latter is to provide technical support and advice, as well as being engaged in research on different aspects of gender equality. Countries with such units include Ireland (Gender Mainstreaming Unit), Greece (KETHI) and some regions of Spain (Andalusian Gender Mainstreaming Unit).

With respect to actors, a characteristic common to all countries is the fact that the government constitutes the main actor in gender equality policy. However, there are important variations with respect to the relative monopoly of the gender domain. Thus, two countries where such government monopoly is quite marked are France and Spain (particularly at central government level). In these countries civil dialogue is quite poor and consultation mechanisms are either merely formal or non-existent. On the opposite side of the spectrum are the UK (especially Scotland<sup>15</sup>) and Ireland, where civil society organisations participate at different stages of the policy process. In these countries consultation mechanisms are fully institutionalised. There also tends to be a body (such as a council or commission) where the voice of women's organisations is represented and accorded advisory powers.

Women's organisations are not necessarily the only actors (apart from government) with a role in gender equality policy. Thus, in some countries academic experts play a more important role in gender policy than do civil society organisations. Examples include Belgium and Greece. Apart from women's organisations and experts, the role played by individual actors in gender equality policy in some countries needs to be noted as well. These are typically women in positions of power who act as champions in advancing a particular gender equality policy in their respective countries. Notable examples include Patricia Hewitt in the UK, Anna Karamanou in Greece and Miet Smet in Belgium.

Although there is evidence of a link between the existence of a healthy civil dialogue in a country and a lessening of government control of gender equality policy, an interesting

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<sup>14</sup> Spain has also instituted a minister for equality since the new government was formed after the March 2004 elections.

<sup>15</sup> Scotland is not the only jurisdiction within the UK where civil participation is key to equality policy. Wales and Northern Ireland (which are not included in this study) share this feature as well.

exception to this rule is provided by Sweden. While Sweden has many mechanisms for participation as well as a prominence of experts making an input into policy design, ownership of gender equality policy in Sweden belongs to the government to a very high degree. There are three possible reasons for this. One is the high trust that citizens invest in the state, the second is the high degree of consensus concerning gender equality, and the third is the fact that gender equality policy is deeply embedded in government policy and structures. Given this, there is very little role left for civil society organisations.

#### **4.1.2 Progress in Gender Mainstreaming**

All countries examined in this study have made a formal commitment to implement a gender mainstreaming approach to gender equality. However, there is evidence of a significant level of variation, first, in the extent to which such a commitment is being, or has been, fulfilled and, second, in the methods or strategies that are being utilised to realise this commitment. While this section concentrates on the first issue, analysing progress on gender mainstreaming in the countries under study, the level of variation in gender mainstreaming strategies among these countries will be the main focus of the subsequent section.

This section has two objectives. The first is to examine the varying degree of effort made in implementing a gender mainstreaming approach in each of the national settings. This will be assessed by looking at factors such as: the objectives of gender mainstreaming, the depth or degree of integration of this approach in law and policy making and the level of innovation that the approach is bringing to policy and policy making. Such an assessment will in turn allow for grouping or clustering of countries on the basis of these variables. The second objective of this section is to provide an explanation for the differences found in relation to gender mainstreaming effort. Particular attention will be paid to the obstacles that are hindering the implementation of gender mainstreaming, particularly in those countries where little progress is evident.

##### Gender Mainstreaming Effort

One country that stands out clearly from the rest in the extent of fulfilling its commitment to implement a gender mainstreaming approach is Sweden. In Sweden, the main goal, and also the rationale, for adopting a gender mainstreaming approach is to combat the structural roots of gender inequality in society. This is regarded as a challenge that other approaches such as equal treatment and positive action have failed to meet. As will be seen, this stands in stark contrast to the other countries in the study where the structural dimension of gender inequality figures but rarely among the objectives of gender mainstreaming. This kind of objective is far-reaching: its achievement requires that gender mainstreaming be deeply embedded in different spheres of human activity (social, political, economic). A second distinctive characteristic of gender mainstreaming in Sweden is that it aims to go beyond incorporating the gender perspective into public policy, extending it to activities emanating from all public bodies (for example public services) as well as to those of non-public organisations in the private sector, civil society, and so on. A third characteristic of gender mainstreaming in Sweden is that it is the result of a very wide consensus between the different social actors and is formally embedded in key political processes. Thus, the government's commitment to adhere to gender mainstreaming as the main principle governing gender equality policy (as set out in Skr 20002/03:140, a document which gives expression to governmental policy in relation to

gender for the term of office) is submitted to parliamentary vote after consultation with the social actors. Such a level of consensus is absent in the other countries, and indeed European countries generally where governmental policy in relation to gender (unless enshrined in legislation) is very rarely submitted to parliamentary vote. Lastly, the Swedish case is also characterised by a high degree of innovation. This includes, amongst others, the design of innovative methods for gender mainstreaming (3-R Method, a method for analysing gender differences in representation and resources, as well as the reasons for such differences, in local government operations)<sup>16</sup>, the role given to experts in the policy process, the incorporation of a gender impact analysis in Budget Bills, as well as the implementation of novel gender mainstreaming projects in different departments (and levels) of the administration and other public (and also private) sector bodies or organisations. In sum, Sweden represents a country where gender mainstreaming constitutes the main approach to gender equality and where the level of progress in the implementation of this approach is quite advanced in relation to other countries.

A second pattern, less advanced than Sweden, characterises Belgium and Ireland, together with the regions of Andalusia, Basque Country and Scotland. All of these cases have gone beyond a purely formal commitment to introduce a gender mainstreaming approach, by taking steps towards its implementation. Such steps mainly consist of putting in place some of the components of gender mainstreaming, which in another way could be conceived of as essential conditions for the implementation of a gender mainstreaming approach. These components are of three main types: techniques and procedures, structural changes and changes in the scope of the policy process and the range of actors involved. The following are some key examples:

- Gathering data and developing tools: These include disaggregated statistics, methodologies, and gender impact assessment tools;
- Setting up new structures: These are typically gender mainstreaming units within the administration with varying responsibilities (depending on the area in question) such as promoting gender mainstreaming, providing technical support to different departments of the administration (and to civil society actors as well) through the design of tools and provision of training, coordinating the work undertaken in different departments and carrying out evaluations;
- Broadening the range of actors involved in gender equality policy: Examples include the role given to experts in Belgium, to women's organisations in Scotland and to the voluntary and community sector in Ireland.

It needs to be noted that, compared to Sweden, all these countries are at a much earlier stage in the development of a gender mainstreaming approach. Another important point of contrast between Sweden and these countries in relation to gender mainstreaming concerns the objectives adopted. While in Sweden the chief objective of gender mainstreaming is to end the structural roots of gender inequality, in these countries structural issues rarely figure among the objectives. Instead, the main objective is to introduce a gender

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<sup>16</sup> The 3R method has primarily been used by Swedish local authorities to review and analyse the degree of influence that women as well as men have on local government operations. It also serves as an aid in systematically compiling facts and information about the situation of women and men. The first 'R' stands for representation and has to do with the number and distribution of women and men in a given organisation. The second 'R' stands for resources and deals with how the organisation's resources are distributed between women and men. The final 'R' stands for *Realia* and has to do with why representation and resource distribution are divided as they are between the sexes.



mainstreaming approach as required by the EU. In other words, in these countries gender mainstreaming is regarded more as an objective than as an approach, or strategy, to achieve gender equality. A second point of divergence between these countries and Sweden is the lack of a political concept of gender mainstreaming in the former. Thus, in Belgium and Ireland gender mainstreaming tends to be conceived of as a technical procedure (or set of procedures) rather than as a concept that can be subjected to different interpretations depending on political ideology. Put differently, gender mainstreaming is generally viewed as a pragmatic rather than a theoretical or political matter. A third point of contrast relates to the fact that, in most of these countries, the future of gender mainstreaming remains quite uncertain while in Sweden it is firmly institutionalised. This is because the gender mainstreaming initiatives that are being carried out are new ventures, many of them tied to the current Structural Funds programming period of 2000-2006 (Ireland, Andalusia) while others have but a pilot status (Belgium). In contrast, the fact that gender mainstreaming in Sweden has become the main approach to gender equality means that its continuity is not an issue.

Despite their similarities, there are also important differences among these countries or administrative units, especially in relation to the degree of embeddedness of gender mainstreaming in public policy as well as the kind of innovation that this approach has entailed. In relation to the former, consider the variation between the case of Ireland - where gender mainstreaming initiatives are disengaged from government policies concerned with gender (being more or less limited to the National Development Plan) - and Scotland where a mainstreaming approach informs and regulates all the activities of both the Executive and the Parliament. Finally, while the introduction of a gender mainstreaming approach has brought some innovation to policy making in all of these countries (to a greater or lesser extent), there are differences in relation to where such innovation is to be found. Two cases that are noteworthy in this respect are the Belgian pilot project on gender mainstreaming, the implementation of which created interesting synergies between the scientific and the political and administrative worlds, and the Scottish Equality Strategy which appears to have succeeded in embedding the principle of equality mainstreaming into all sectors of public life through civic participation.

France, Greece, Lithuania, Spain and the UK represent a third grouping of countries. In all of these cases recent governmental documents explicitly refer to gender mainstreaming either as an objective or as a principle governing gender equality policy. Examples include the recently launched French Equality Charter, the currently operating Greek, Lithuanian and Spanish national plans on equal opportunities and the UK government document outlining the gender targets to be reached within the next four years (Delivering on Gender Equality). Despite these formal commitments to gender mainstreaming, however, all share the characteristic that, except for a few initiatives, there is very little evidence that this approach is actually being implemented. In short, these countries show evidence of a significant gap between rhetoric and practice in relation to gender mainstreaming.

A second feature common to all of these countries is that the term 'gender mainstreaming' is devoid of any clear and concrete meaning and, therefore, often tends to operate as a catch-all term which is used to refer to varying approaches and activities. For example, it is not uncommon to find in these countries that the term 'gender mainstreaming' mainly functions as a new name to refer to old policy practices such as positive action measures, transversal national plans involving different departments of the administration (even if such plans are clearly informed by a positive action approach) and even equal treatment



legislation. Apart from this, there is also evidence in these countries that 'gender mainstreaming' is exploited to serve diverse political needs. For example, in France and Greece politicians and government officials conveniently use the term 'gender mainstreaming' to refer to a move from a focus on women to a more neutral focus on gender (which is simply understood as referring to both women and men) as the main concern of equality policy. On the other hand, in the UK the term 'gender mainstreaming' is cast in terms of sensitivity of public service providers to the diverse needs of their customers, a use which is more indicative of the wider priorities of the New Labour government rather than of a commitment to a gender mainstreaming approach.

A third common feature is that gender mainstreaming initiatives in these countries tend to be fragmented, in that relevant efforts are confined to very specific domains and lack a connection with a more general policy on gender equality in the country. For example, in France, Greece and Spain an imbalance can be observed between progress in gender mainstreaming in the domains of education and employment and other domains. A fourth common feature shared by initiatives in these countries is that they may be the result of a great deal of effort and perseverance from individual women in key positions of power (e.g., ministers, senior civil servants, MEPs) or even women's organisations, rather than of a decision, at high government level, to pursue a new gender equality policy approach. Examples include the roles of Anna Diamantopoulou and Anna Karamanou in Greece, Patricia Hewitt in the UK and women's groups in Lithuania.

Having outlined the similarities among this grouping of countries concerning the degree of effort in the development of a gender mainstreaming approach, some differences also need to be noted. Taking these differences into account divides the grouping into two sub-groups - one consisting of France and the UK and the second of Greece and Spain. The factor that mainly distinguishes these two sub-groups is the extent of the gap between rhetoric and practice in relation to gender mainstreaming. Hence, France and the UK have taken some steps towards gender mainstreaming whereas Greece and Spain show little evidence of implementation of their formal commitment to gender mainstreaming (as stated in their national equality plans). In the latter sub-group, efforts are concentrated on specific domains, as evidenced in the analyses of gender equality in education. Lithuania, on the other hand, constitutes a case apart and should thus be viewed on its own. What distinguishes it from the rest is that the concept of gender mainstreaming seems to be absent not only from governmental policy practice but from policy discourse as well. At present it has currency only in the NGO context. Given this, the following analysis will concentrate on France and UK on the one hand, and Greece and Spain on the other.

Of the four countries, France shows most evidence of governmental effort to implement a gender mainstreaming approach. However, it should be noted that, in France, developments in this respect are too recent (March 2004) to assess their impact on gender equality policy. Relevant developments include the launch of an Equality Charter, together with the establishment of structures aimed at providing an interface between government and civil society (National Council for Equality), and the development of networks facilitating exchange of knowledge and ideas among the diverse equality NGOs (Parité Network). The Equality Charter sets out governmental policy and a plan of action that includes specific measures, the implementation of which involves all government ministries. However, a remarkable feature of the Charter, in a national and international context, is that it seems to enjoy a high degree of consensus, since it has been signed off not only by the government as a whole but also by a very wide network of actors

comprising public service providers, trade unions, women's organisations and other relevant actors (such as chambers of commerce and industry), as well as different levels of the administration including the local, departmental and regional. Apart from this, there are other initiatives underway which feed into the gender mainstreaming project. One such initiative is the 'Yellow Budget', a first step towards an institutionalisation of gender analysis of budgets (which will become effective in 2006).

In contrast to France, the UK lacks a clear and coherent policy on gender mainstreaming. There is no single document giving expression to such a policy, nor is there a plan of action containing specific measures to be implemented by a variety of government departments. Also lacking in the UK is a wide consensus bringing together a variety of actors as to what this policy should be. The only document available in the UK is a collection of targets or commitments that have been previously set by different departments within the context of the public service reform initiated by the New Labour government. However, there are a number of factors which situate the UK closer to France than to either Greece or Spain in the level of effort made to introduce a gender mainstreaming approach. The first is that the UK Women and Equality Unit has developed tools to assist government departments and other public bodies in the integration of a gender perspective. These include the publication of gender mainstreaming guidelines as well as other information about this approach. Similar tools have been developed in Greece and Spain but only in the context of the Structural Funds (where gender mainstreaming constitutes a requirement anyway). Secondly, the UK has taken some initial steps towards gender analysis of budgets through the launch of a pilot project involving three government departments. Although the future of gender budgeting after this project is uncertain, the fact that it was carried out reveals some degree of commitment on the part of (at least) some ministries to introduce a gender perspective in the budget process. By contrast, there is no evidence of gender budgeting (even in the form of a pilot project) in either Greece or Spain.<sup>17</sup>

As mentioned above, both Greece and Spain have made a formal commitment to introduce a gender mainstreaming approach in their gender equality policy. Such commitments are stated in their most recent government equality plans and, in the case of the Spanish plan, it is accompanied by a comprehensive set of measures aimed at laying down the conditions for the effective introduction of such an approach. These measures include, *inter alia*,<sup>18</sup> the design of gender impact assessment tools, the improvement of gender disaggregated statistics, the introduction of gender analysis of budgets, the design of training courses for officials in gender mainstreaming concepts and methods and the development of mechanisms for monitoring progress in gender mainstreaming across government departments. Despite these commitments, however, there is still very little evidence of gender mainstreaming activities with the exception of some isolated measures (for example in Spain gender impact assessment reports accompanying all new pieces of legislation). In both countries, gender mainstreaming is operative almost exclusively within the context of the projects funded under the current programme of EU Structural Funds.

Such lack of progress in gender mainstreaming in both Greece and Spain invites a reflection about its possible roots. A close analysis of the findings included in the national reports of both of these countries points towards a mix of social, economic, political and

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<sup>17</sup> This refers only to Spanish central government, however. There have been gender budgeting experiences in other parts of the country, such as in the Basque region.

<sup>18</sup> The Plan includes a total of 16 measures under the gender mainstreaming objective.

cultural factors. In the first place, gender mainstreaming requires a technical style of policy making that is quite alien to either Greek or Spanish policy traditions. Secondly, there is in both countries a very strong perception, especially on the part of the women and the feminist movement, that gender mainstreaming is not necessarily the best approach to tackling problems of inequalities in relation to gender (this contrasts with the more sympathetic attitude towards gender mainstreaming in the British or French women's movements). Thirdly, there is some evidence that collaborative work involving several government agencies in one particular project is extremely difficult in these countries (particularly Greece). This is due to power struggles which arise from a reluctance on the part of specific sections of certain government departments to allow other agencies (governmental or not) get involved in affairs that are considered their province. This results in lack of communication across the different departments of the administration and, ultimately, fragmentation in the development of a gender mainstreaming approach. Fourthly, these are countries that are often portrayed as having a particularly strong patriarchal tradition. Although the strong patriarchal tradition of the Mediterranean countries has become something of a cliché, this may be acting as an obstacle to the implementation of gender mainstreaming.

#### **4.1.3 Modelling Gender Mainstreaming**

As the last section showed, three out of the eight countries under study (Belgium, Ireland and Sweden)<sup>19</sup> show clear evidence of having introduced, or else being in the process of introducing, a gender mainstreaming approach to their gender equality policies. The supporting evidence showed that in these countries there has been a change in the understanding of the inequality problematic, as well as the establishment of new policy practices, techniques or institutions with the specific aim of integrating a gender perspective into policy making across different domains. However - as also noted in the previous section - a comparison of the degree of progress in gender mainstreaming achieved by these countries against a number of indicators shows significant levels of variation. Thus, while Sweden has embraced gender mainstreaming as the main policy approach to gender equality - an approach that aims to involve all sectors of society (both public and private), policy domains and levels of government - in Ireland, gender mainstreaming is currently at the very early stages of information gathering and awareness-raising, as well as being confined to the measures contained in the National Development Plan. Belgium provides an in-between scenario in that, while gender mainstreaming is, like in Ireland, in the early stages of development, it involves a wider range of policy domains and governmental institutions. In the other countries, especially France and the UK (at central government level), and to a lesser extent, Greece and Spain (the latter also at central government level), gender mainstreaming is highly fragmented, being confined either to a particular domain or to a specific programme within a domain and disconnected from general governmental policy on gender. Thus, for example, in France<sup>20</sup>, Greece and Spain, the evidence suggests that gender mainstreaming is mainly confined to the domain of education. Outside of this domain, gender mainstreaming initiatives in these countries are limited to the disbursement of the Structural Funds. As will be seen, countries with fragmented gender mainstreaming practices are those where a coherent and elaborated

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<sup>19</sup> As indicated in the last section, gender mainstreaming is also being implementing in some regions of Spain and the UK.

<sup>20</sup> This claim about France needs to be qualified. As indicated in the previous section, France has recently taken important steps towards a gender mainstreaming approach, although these are too recent to be taken fully into consideration in this analysis.

governmental policy on gender equality is either missing (as is the case in the UK) or else very different to the principles of gender mainstreaming (like in Spain).

An analysis of variation in relation to the strategies of gender mainstreaming adopted throws light upon the development of gender mainstreaming in Europe in a significant number of ways. First, it shows how elastic is the concept of gender mainstreaming as it is applied in practice. Thus, while all the countries included in this study may coincide in how they define gender mainstreaming (as there is a very limited pool of standard definitions), they show a significant degree of diversity in the way the general idea contained in these standard definitions is put into practice. As will be demonstrated, such variation very much depends on the policy tradition of the country as well as the general government objectives in relation to gender equality. In a nutshell, an analysis of the strategies adopted to implement a gender mainstreaming approach shows that there are multiple ways in which this can be done and that the particular form adopted tends to depend on certain characteristics of the state of gender equality policy in the country as well as on the dominant tradition in this area of policy.

Secondly, an analysis of the different ways in which gender mainstreaming is developing in the countries under study shows that there is not a best strategy to advance a gender mainstreaming approach. This would be the case if the countries where progress in gender mainstreaming is most advanced (i.e., Sweden, Belgium and Ireland) were found to have followed the same or similar strategies. However, the opposite is the case in that these countries follow very different strategies.

An analysis of how countries are implementing gender mainstreaming allows the construction of ideal-type models of gender mainstreaming on the basis of the approach taken in the eight countries. The focus here is on a country's approach to gender mainstreaming, rather than on their progress which was the focus of the last section. It should be borne in mind that: a) there may be important differences among the countries included in one particular model; b) there might be countries that are mid-way between two models (which means that hard decisions have to be made in categorising them) and c) that there may be countries where two different mainstreaming policies are running in parallel, each one of which may fit a particular model. Finally, it should be borne in mind that these are models of gender mainstreaming and not models of gender equality. It is for this reason that some countries barely make a presence in the discussion (e.g., Lithuania, Spain) even though they may have in place a consolidated gender equality policy.

There are four models of gender mainstreaming encapsulated by the eight countries.

#### Model 1: The integrated model

The first model can be called the integrated model of gender mainstreaming. Of the eight countries studied here, Sweden is closest to this model. In this model gender mainstreaming is seen as a strategy aimed at achieving a more gender-equal society. While in other countries such a general objective tends to be mainly rhetorical, the Swedish example stands out in that policy discourse rests on a careful articulation of the notions of 'equality' and 'gender mainstreaming', as well as providing a clear rationale as to why the latter is the most suitable approach to achieve the former. An examination of this policy discourse is revealing as it sheds light on the Swedish strategy for implementing a gender mainstreaming approach.

In Swedish policy discourse, the equality/inequality problematic is mainly understood in structural terms, as a problem of gendered patterns of power relations. Key to this understanding is the idea that gendered power structures affect all areas of human activity and human relations and cross the different social spheres (i.e., public as well as private). For example, gender is seen to affect relations in both the work and domestic worlds, as well as key activities carried out by public (as well as private) bodies such as legislative activity, policy making and provision of goods and services.

Such an understanding of the problematic entails that gender equality policy must be designed to permeate all of these areas of human relations and activities if it is to have a real impact on the lives of ordinary women and men. In other words, gender equality policy must be all-encompassing. This also means that responsibility for gender equality cannot be confined either to a particular government body or to central government bodies but must rather spread across departments and down to lower government levels that hold direct responsibility for a number of public services (e.g., health, social care, education). In addition, responsibility for gender cannot be limited to the public sector but must be shared with the private and voluntary sector as well.

Such an all-encompassing approach is what in Sweden is called ‘gender mainstreaming’. In sum, gender mainstreaming in Sweden refers to an approach to gender equality that primarily consists of extending responsibility for gender equality to different actors and institutions in society. This transferring and sharing of responsibilities requires new policy-making techniques such as training of officials, design of gender impact assessment methods and close monitoring and evaluation of policies. These functions, which are still largely reserved for the main gender equality unit in central government (i.e., Division of Gender Equality) are aimed at ensuring that gender mainstreaming is effectively implemented in all areas.

An analysis of gender mainstreaming in Sweden reveals that, in putting this approach into practice, there are a number of conditions that must be met. First, improving the knowledge and awareness of gender issues across the different social actors is considered in Sweden as an essential condition for making gender mainstreaming possible and hence many initiatives are geared towards this aim. Important examples include in the education domain, the establishment of two ‘Centres for Fundamental Values’ aimed at increasing awareness of gender stereotyping in education among educators and education managers and, in the domain of health and social services, government commissioning of a project for the analysis, evaluation and follow up of gender differences regarding the quality, cost and availability of services. Other significant initiatives in this regard include the designation of gender equality experts, who are given a key role in the implementation of gender equality policy in the country.<sup>21</sup> A second condition of gender mainstreaming in Sweden is a strong commitment to gender equality on the part of the government, parliament and social partners, as well as a broad consensus on the vision, aims and direction of gender equality policy. A third condition that needs to be in place for gender mainstreaming to be successfully implemented is the existence of mechanisms that monitor

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<sup>21</sup> These include: a) a national gender equality expert who is responsible for examining gender equality policy regarding its goals, directions, organisation and efficiency, and b) a pool of experts in every County Administrative Board with the task of contributing to meeting national gender equality objectives through cooperating with other actors, building up and spreading knowledge, as well as initiating and following up gender equality policy at regional level.



and evaluate how the integration of gender is proceeding across the different policy domains and government levels. In Sweden, the main mechanism is a requirement on all public institutions to submit regular reports to government on progress in gender mainstreaming. Such institutions include all government departments, public service bodies such as schools, universities and hospitals, municipalities, and so on.

Perhaps it is the case that these conditions can be met in Sweden because it already has some characteristics that are favourable to the introduction of a broad-ranging gender mainstreaming approach. These are, first, a long tradition of gender equality in which a large body of research and other gender mainstreaming tools have been built up over time and, secondly, a democratic tradition with strong accountability mechanisms and a strong role for parliament as a body to which all government institutions are ultimately accountable.

As we will see over the next pages, in other countries with very different policy traditions (and needs), the introduction of a gender mainstreaming approach has been pursued differently.

## Model 2: The transversal model

The second model is what we call the transversal model of gender mainstreaming. Of the eight countries under study, this model is best represented by Belgium. However France, as well as some Spanish regions like Andalusia, show evidence of this approach.<sup>22</sup>

In the countries representing this model, the concept of a ‘transversal approach’ to gender equality is often used interchangeably with that of ‘gender mainstreaming’. In these contexts, the term ‘transversality’ indicates an involvement of different government departments or ministries in the implementation of a plan or programme of gender equality. Such plans require some level of cross-governmental consensus and coordination since they consist of the allocation of a number of specific gender equality objectives to each of the ministries involved. Such objectives can be quite varied, ranging from general commitments to integrate a gender perspective into the policies of a given department or ministry, to specific measures aimed at laying down the conditions for the implementation of a gender mainstreaming approach (such as for example the production of indicators and evaluation tools). The implementation of those objectives is usually supported by a dedicated agency or unit of the administration which can be either independent in status or else attached to a given government ministry.

The countries included in this cluster all share a tradition of gender equality policy that is clearly dominated by a positive action approach. This renders the transversal plans distinctive in a number of ways:

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<sup>22</sup> As already indicated, the measures effected by the central government in Spain towards gender mainstreaming are too limited to be fully included in this model of gender mainstreaming, despite the fact that Spain shares some characteristics with the countries included in this group. Thus, in Spain the main approach to gender equality policy has been, since the 1980s, a transversal approach. However, what distinguishes the Spanish case from that of Belgium is that in Spain this transversal approach mainly involves positive actions and not gender mainstreaming. Although there are some signs of a turn towards a gender mainstreaming approach in Spain, these are confined to specific domains like education. France constitutes a similar case in this respect, although the new *Equality Charter* draws France closer to Belgium than to Spain.



- In conjunction with measures that are more focused on the implementation of gender mainstreaming, these transversal plans also contain a significant number of positive action measures and, in many cases, constitute the majority of measures or actions;
- The majority of measures in these transversal plans (including some with a clear gender mainstreaming dimension) are specifically targeted at women;
- The boundaries between gender mainstreaming and positive action measures are quite fuzzy and, therefore, difficult to distinguish;
- These plans are often geared towards laying down the conditions for gender mainstreaming. In this sense, some of the relevant national or regional plans (like for example the Belgian plan) may be viewed only as a preliminary step towards the full implementation of a gender mainstreaming approach.

These features characterising the transversal model of gender mainstreaming raise an interesting question about the differences between a positive action and gender mainstreaming approach to gender equality. More specifically, the question is raised about how to identify a policy in transition from one approach to the other, as is the case for the countries included in this grouping. In order to address these questions, the Belgian and French approaches are compared with the Spanish and Swedish ones. These comparative exercises will shed light on what distinguishes a country in transition from positive action to gender mainstreaming from one like Spain where the main approach is positive action and one like Sweden where the main approach is gender mainstreaming.

As stated above, the Equality Plans recently introduced in Belgium and France can be considered as gender mainstreaming plans insofar as they are primarily geared towards laying out the conditions for the implementation of a gender mainstreaming approach. Note that in these transversal plans ‘gender mainstreaming’ functions more as a primary objective than a means or approach to achieve gender equality. How do these transversal plans contribute to achieving the objective of laying down the conditions for gender mainstreaming? To begin with, a number of initiatives may focus on measures such as the production of data and indicators disaggregated by sex, the design of the necessary evaluation and monitoring tools (e.g., gender impact assessment methods) or the training of relevant officials in gender analysis awareness and techniques.

However, a significant feature of these plans – one that indicates a transition from a positive action to a gender mainstreaming approach – is that the measures contained in them reveal a new awareness of gender stereotyping or gender bias in institutions and institutional practices. As a result, the focus of gender equality policy turns to: a) public services such as education and training, career advice, health, social care, transport, culture and leisure, and b) policies and programmes emanating from different departments of the administration and other public bodies such as tax and fiscal policy, anti-poverty policy, employment policy education policy, agriculture policy. For example, the Belgian Strategic Plan for Equality Affairs includes objectives concerning an increase in the number of women in certain public bodies such as the army and the diplomatic service. At first sight, there is nothing distinguishing this objective from those included in more traditional positive action programmes. The mark of a shift in approach is evidenced by the fact that these objectives are met by measures that focus on recruitment procedures and the nature of existing qualifying tests (inter alia). Apart from this, the Belgian plan also includes measures aiming for the integration of a gender dimension into specific programmes such as the drugs and mental health policy programmes. In sum, while in these transversal programmes the target of specific policy measures may still be primarily

women (as in a typical positive action approach), a closer reading of them suggests that they seek to promote a gender analysis among civil and public servants in the design and administration of their policies and practices.

In contrast to the Belgian plan, the Spanish plan is mainly draws on a positive action approach. In it, 'gender mainstreaming' is not the primary policy objective but is listed as one among a total of twenty-one. Also, unlike the Belgian plan, the measures in the Spanish aimed at introducing a gender mainstreaming approach are not placed side by side with positive action measures throughout the whole plan but are all concentrated around the first objective (on gender mainstreaming) and separated from the rest. Moreover, while the Spanish plan also contains measures that reveal an awareness of institutionalised sexism (especially in the social security system, the education system and the media), these appear to be patchy insofar as no connection is made (either explicitly or implicitly) with the gender mainstreaming objective. Apart from this, the Belgian plan was implemented with the support of a body of experts working within a dedicated unit which was specifically set up with the aim of providing support to the departments involved, as well as for carrying out a final evaluation. In addition, the evaluation carried out was a critical one, which indicated the obstacles encountered in the execution of the plan. In contrast, the Spanish plan lacks this kind of support and evaluation structures.<sup>23</sup>

The transversal model of gender mainstreaming represented by Belgium and, to a lesser extent, France, is also different from the integrated model represented by Sweden. To begin with, although both models share an awareness of entrenched gender bias in institutions and institutional practice, gender mainstreaming in Belgium, far from being part of a grand vision of society, is quite a pragmatic affair. Thus, in Belgium gender mainstreaming is stripped of any theoretical, or even political, dimensions. This stands in stark contrast to gender mainstreaming in Sweden which is linked to a feminist discourse that focuses on the gendered power structures that are at the root of gender inequality in society.

A second difference concerns both the scope and depth of gender mainstreaming practices. In Belgium and France, gender mainstreaming initiatives are part of a time-bound government plan for gender equality that is still dominated by positive action measures. Moreover, such initiatives are quite modest in that they usually involve the integration of a gender perspective in one concrete programme or service.

A third noteworthy difference concerns the range of actors that participate in the implementation of gender mainstreaming. Thus, in Belgium the implementation of the measures included in the plan generally involves a variety of government departments but not other actors from the public, private and voluntary sectors (such as public agencies, employers and women's associations) as is the case in Sweden.

Fourthly, there are also important variations across government departments in the implementation of these initiatives, mainly due to varying levels of awareness of and commitment to gender equality issues across the administration. In contrast, in the integrated model represented by Sweden gender mainstreaming is a much more universal affair. Thus, notwithstanding some resistance on the part of the municipalities, in Sweden,

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<sup>23</sup> The Women's Institute is supposed to fulfil these functions. However, this institution has played a limited role during the tenure of President Aznar.

gender mainstreaming practices are not confined to governmental departments but involve society at large. Second, the prevalence of such practices is much more uniform across government, although there are important differences between the central and municipal levels. In sum, due to its long tradition of gender equality the pillars upon which a gender mainstreaming approach is built in Sweden are much more solid than in either Belgium or France. In these latter countries, there is no consensus about the need for every relevant social actor to take responsibility for gender equality.

### Model 3: The EU-driven model

The third model of gender mainstreaming we call ‘the EU-driven model’. In the countries representing this model, the EU – especially through its requirement to integrate a gender perspective in the disbursement of the Structural Funds - constitutes the main driver in the introduction of gender mainstreaming practices. Ireland is a prime case here and Greece and Spain can also be said to fit the model. Lithuania deserves separate attention as a country where the EU influence on gender equality policy is being brought to bear by women’s groups which, as the key actors of gender equality in the country, have played an important role in lobbying an unsympathetic government to make progress towards the implementation of EU requirements in relation to gender, including gender mainstreaming. The case of Lithuania thus stands in stark contrast to the other countries included in this grouping, especially Greece and Spain, where women’s groups have been important sources of criticism of EU policies on gender equality, especially (but not solely) gender mainstreaming. Given the distinctiveness of Lithuania in relation to the other countries in this group, the analysis that follows mainly concentrates on Ireland, Greece and, to a lesser extent, Spain.

Ireland represents an exemplary case of how the opportunities provided by the EU mandate to integrate a gender perspective can be capitalised upon by national actors. What distinguishes Ireland from other countries where gender mainstreaming is being introduced mainly through the Structural Funds’ route is that the Irish National Development Plan is mainly funded by national, rather than EU, sources (93% national as opposed to 7% EU). In addition, such a commitment to gender mainstreaming has led to new gender mainstreaming practices and institutions, including the introduction of tools and techniques for gender analysis (such as for example gender impact assessment) together with the production of disaggregated data and indicators that are essential for the systematic evaluation and monitoring of policies from a gender perspective. Apart from these developments in policy practices, two dedicated gender mainstreaming units have been established with a remit to provide support and advisory services to officials involved in the implementation of the National Development Plan.

Greece is a very different case. Although some efforts at gender mainstreaming are also underway there, these are located almost exclusively within the context of EU Structural Funds. In addition, these measures are mainly concentrated in the education domain, in particular within the EU-funded national education programme EPEAEK II. It needs to be noted, however, that the commitment to integrate a gender dimension into the Greek education system has shown a level of dynamism that is absent in Ireland, despite the fact that the Irish National Development Plan contains a similar commitment to gender mainstreaming in this domain. Thus, under EPEAEK II, Greece has implemented a large-scale programme of gender equality in the education domain involving both teacher training and specific classroom interventions. The programme, which is being

implemented in most secondary schools in the country and is intended to include all of them, is aimed at sensitising both teachers and students to gender-relevant issues and processes in socialisation processes, patriarchal structures, gender bias in curricula contents as well as gender stereotyping in educational materials and career choice. The content of the programme reveals a high level of awareness that gender-stereotyping practices exist within the mainly state-provided, education system. In contrast, gender mainstreaming activities in education in Ireland have been much more modest, although this may be due to the fact that, unlike the case of Greece, education in Ireland is still mainly in the hands of the Catholic Church which, among other things, gives less space for manoeuvre to the government. Despite the differences, both the Irish National Development Plan and the Greek EPEAEK II provide an example of how to go beyond paying lip service to the EU mandate to integrate a gender dimension in the programmes funded through the Structural Funds.

In both cases, the commitment to integrate a gender perspective in these programmes has resulted in the implementation of innovative gender equality measures, as well as a change in policy-making techniques, such as the development or improvement of evaluation methods and tools (e.g., gender impact assessment methods, production of disaggregated data, indicators and targets). This contrasts with Spain where the opportunities provided by the EU requirement to integrate a gender perspective in the projects funded by the Structural Funds have only been capitalised upon by the regional administrations. Although the Women's Institute at the central government level is developing a number of courses and seminars aimed at training relevant officials in the principles and methodology of gender mainstreaming, evidence of gender mainstreaming activity at this level does not match that undertaken either in Greece or Ireland.

Despite differences among these countries in relation to how the opportunities provided by the EU are capitalised upon, the most distinctive feature shared by all is that gender mainstreaming practices are not evolving from national approaches to gender equality policy but are rather imported from the EU. Such an overwhelming EU influence endows these countries with a number of interrelated features in relation to gender mainstreaming which are quite distinctive when they are put alongside the other countries. To begin with, in these countries gender mainstreaming is not part of a larger vision of gender equality as it is, say, in Sweden but is rather more of an end in itself. Furthermore, gender mainstreaming is generally understood in quite bureaucratic or technocratic terms, usually referring to gender impact assessments and other policy-making and policy evaluation procedures. This is most evident in the case of Ireland, although we can find evidence of it also in Greece and Spain (although in these two countries gender mainstreaming seems to work more as a catch-all term with many different interpretations).

A second characteristic is that, since such technical activities labelled as 'gender mainstreaming' are mainly confined to the context of the Structural Funds, where gender mainstreaming practices are being developed outside of these contexts (e.g., 'coeducation' in Spain and general equality mainstreaming in Ireland) alternative terms to 'gender mainstreaming' (like, for example, 'transversality' in Spain or 'equality proofing' in Ireland) are used. These are terms which, unlike the borrowed 'gender mainstreaming', are closely connected to the indigenous policy tradition. Thus for example, in Spain positive action programmes have, since their introduction in the 1980s, followed a typically transversal approach so that this term is more familiar to policy makers than that of 'mainstreaming'. Similarly, the term 'equality (or gender) proofing' in Ireland is more

familiar to policy makers than ‘mainstreaming’ since it is consistent with a tradition of poverty proofing practices there.

A third characteristic shared by these countries is that gender mainstreaming objectives and practices have not been integrated into the mainstream of governmental policy. In effect, gender mainstreaming in the context of the Structural Funds is carried out in isolation from other elements of gender equality policy. The cases of Ireland and Spain again provide clear examples of this pattern. Thus, in recent years, Ireland has built up a wide-ranging body of legislation on general equality which requires public (and also private) agencies to engage in mainstreaming practices. However, there seems to be no specific connection made between this policy and the gender mainstreaming policy attached to the National Development Plan. Similarly, in Spain gender mainstreaming practices in the context of the Structural Funds are being carried out at the margins of general gender equality policy. For example, the most recent central government equality plan (where gender equality policy is articulated) includes just one objective out of a total of 21 on gender mainstreaming. In Greece, gender mainstreaming initiatives outside the Structural Funds tend to originate not in government but to be initiated by individual political actors with a strong commitment to pushing forward the gender mainstreaming agenda.

A fourth common characteristic to these countries is that there is no evidence of inter-departmental collaboration, or indeed coordination, in the implementation of a gender mainstreaming approach. Striking examples of this are provided by both Greece and Ireland in their respective experiences in integrating a gender dimension in the education domain. In both of these countries, the agencies in charge of implementing gender mainstreaming in education policy are working in relative isolation from the other activities of the relevant ministry. One possible reason for such relative isolation is the fact, that in these countries, gender mainstreaming has not evolved from an indigenous gender equality policy. It may be the case that it therefore lacks consensus or the commitment from the government as a whole (including the different ministers). This is a characteristic that sets the countries included in this grouping apart from those included in the previous groupings. As we have seen, in Belgium, France and Sweden gender mainstreaming initiatives emanate from a broad consensus about the aims and direction of gender equality policy.

Finally, a fifth characteristic is that gender mainstreaming initiatives in these countries (with the possible exception of Ireland) are greeted with some resistance from such actors as officials working in gender-dedicated agencies, academic researchers and feminist organisations. Thus, in both Spain and Greece actors interviewed claimed that the conditions in their respective countries were not ripe for the introduction of gender mainstreaming and warned of the negative impact that such policies might have on progress towards a more gender-equal society. An additional reason for such resistance to gender mainstreaming initiatives might be the fact that these are being developed within the Structural Funds programmes, and thus belong to a framework with the primary objective of increasing economic competitiveness and productivity rather than genuine gender equality objectives. For example, EPEAEK II places gender equality policy in education within a wider economic context. According to this logic, and in order to meet the eligibility criteria set by the EU, the gender equality measures, actions and programmes included in EPEAEK had to be designed so as to relate to the needs of the labour market.



Similarly, the Irish National Development Plan has as its primary objective to strengthen and improve on Ireland's international competitiveness so as to support continued, but more balanced, economic and social development. Even though gender mainstreaming is much more accepted in Ireland than in either Greece or Spain, it cannot be said with certainty that when the operative period of the National Development Plan is over (in 2006), gender mainstreaming practices will be assimilated within the general equality policy that is dominant in the country at the moment (i.e., the policy developed within the framework of the Equal Status Act, 2000).

#### Model 4: The generic equality model

The fourth model is more a model of mainstreaming equality rather than one of gender mainstreaming proper. However, under this model mainstreaming practices that are gender specific are being developed as well. This model we name the generic model. Of the countries included in the study, this model of mainstreaming is most evident in the UK - especially in the devolved governments of Scotland, Northern Ireland and Wales. Mainstreaming experiences in these jurisdictions are often taken as a test case for the central UK government, which may be why the development of mainstreaming practices at the central government level is proceeding significantly more slowly than in the devolved governments. Some aspects of the development of mainstreaming practices according to this model are also evident in Ireland and, to a lesser extent, Lithuania.

In this model, gender mainstreaming practices are introduced as part of the development of a broader equality mainstreaming approach. Although there are some differences among these countries or jurisdictions in the depth and scope of equality mainstreaming practices, they mainly consist of the integration of an equality perspective into all public institutions and activities, including policy making, service provision and so on. In some cases, these developments have been triggered by the introduction of new equality legislation while in others they are the result of a broad commitment (involving government and civil society) to put equality at the heart of policy making. In the countries representing this model, an equality mainstreaming approach marks a new departure from the more traditional anti-discrimination approaches (whose effectiveness was highly dependent on litigation) towards a more pro-active approach. Another common feature is a move from an equality policy that was centred on gender equality in particular to one where gender constitutes only one consideration or ground among many others (e.g., disability, race, sexual orientation and so on). As was evident from the interviews conducted in these locations, this is a highly contested feature. A significant number of actors expressed a fear that gender considerations might be diluted or rendered less visible. However, important differences have been reported in the extent to which the gender ground is taken seriously. A brief sketch of the different developments recently undertaken in the UK serves to reveal their significance and how they represent a move towards a mainstreaming approach.

In Northern Ireland, Scotland and Wales, the recent devolution process has galvanised important developments in equality policy. In Northern Ireland and Wales such developments are closely tied to the arrangements relating to equal opportunities as laid out in their respective devolution statutes. In Wales, for example the Welsh National Assembly is required to consider equality when carrying out all of its functions. This is a statutory duty which, in practice, compels elected representatives and officials to mainstream equality throughout their work. The duty has a wide scope and applies to all the Assembly's functions, including education, economic development, health, local



government, social services, planning, transport, housing and industry. In Northern Ireland, all designated public authorities in the province are under a duty to have 'due regard' to the need to promote equality of opportunity in respect of defined groups of people. By 'due regard' is meant the need for consultation with the relevant groups in the drawing up of initiatives and assessing the impact of these equality initiatives on the groups defined in the legislation.<sup>24</sup>

Scotland constitutes a distinctive case, since equality mainstreaming does not directly emanate from legislation or legislative arrangements but is the result of a strong and wide commitment by all relevant actors in society to: a) a vision of equality in the territory and b) a mainstreaming approach as a way of realising that vision. Scotland provides a case of mainstreaming that is as close to the generic model of the UK as it is to the integrated model of Sweden. Although the Scotland Act, 1998 is much weaker than either its Northern Irish or Welsh equivalents in placing a specific legal responsibility on public authorities to advance equal opportunity,<sup>25</sup> the Act does give the Scottish Parliament power to encourage equal opportunities. Similar to the cases of Ireland North and South 'equal opportunities' is defined by a comprehensive notion of discrimination covering a number of different grounds, one of which is gender. Despite that weakness in the legislation, since the Scottish Parliament and the Scottish Executive took up their full powers in July 1999, a commitment to equality has been translated into a large number of activities, including the launch of an Equality Strategy the following year. In this strategy, the main approach adopted is equality mainstreaming. A remarkable feature of the Equality Strategy is that it is being implemented in partnership with a wide range of actors, including the parliament, public sector bodies and agencies, local authorities, statutory equality bodies, communities, educational institutions, voluntary sector, private sector, established forums and networks, academics and trade unions.

Turning to the UK central government, as mentioned developments in relation to equality mainstreaming are proceeding more slowly than in any of the devolved governments, although they are taking a generally similar path. At present, UK-wide equality legislation lacks a statutory public duty to promote either gender equality or equality in a more general way. The only piece of legislation placing public authorities under a statutory duty to promote equality is the Race Relations (Amendment) Act, but this law only applies to race. The key actors in gender equality (the Women and Equality Unit, the Women's National Commission and the Equal Opportunities Commission) have for a long time been lobbying for the introduction of a positive duty on gender similar to that operating in relation to race, pointing to the need to overcome the traditional equal treatment approach (represented by the existing equality legislation) by way of introducing a more 'proactive' approach. The introduction of legislation on a gender duty was finally announced by the government in May 2004, in the context of the proposal for a new Commission for Equality and Human Rights, which will amalgamate the three existing equality commissions. This duty will mean that public bodies will not only have to ensure equality of opportunity for women and men in their workforce but will also have to ensure that they do not discriminate against women or men in how they provide services. Such an initiative,

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<sup>24</sup> Despite the similarities in the equal opportunities arrangements provided in the *Northern Ireland Act* and the *Government of Wales Act*, there are also some small differences: a) the former gives much more detail than the latter as to how mainstreaming should be carried out, b) the equality duty in Northern Ireland does not apply to its Assembly, while it does in Wales.

<sup>25</sup> In Scotland such responsibility only exists in relation to race as a result of the UK-wide *Race Relations (Amendment) Act*.

together with the context in which it is being introduced, is in line with the two main patterns of equality policy followed in all the countries or jurisdictions included in this group (the qualifications made for Scotland notwithstanding): a) a move from an equal treatment approach to a mainstreaming approach through the introduction of new legislation, b) the move from a gender-focused equality policy to a policy that covers a number of grounds of discrimination apart from gender.

Apart from the main patterns of development of an equality mainstreaming approach indicated above, the countries (regions for the most part) included in this model share a number of features which facilitate the implementation of this approach. One such feature is a partnership or social dialogue approach to the design and implementation of equality policies. Non-governmental organisations and related agencies have played a key role (through lobbying and participation in consultation) in the transition to equality mainstreaming. A second feature shared by the countries included in the generic model is that developments in mainstreaming policies are part of a bigger initiative on governance. Thus the UK main document of governance policy - Modernising Government – already includes the idea of mainstreaming in policy making and service provision as a road towards better government. Similarly, in the devolved governments equality mainstreaming was developed at the same time that governance structures were being set in place, so one thing cannot be regarded as isolated from the other.

It is interesting to note that in a number of other countries gender equality policy is also being subsumed under a more general equality policy. One example is Lithuania, where the move from gender equality to generic equality has been marked by the introduction of recent equality legislation and a change in the remit of key institutions of gender equality, which are now responsible for general equality policy. However, these changes do not necessarily provide evidence of a move towards a full equality mainstreaming approach of the kind that has been introduced in Scotland and Wales, for example. Therefore, the development of an equality mainstreaming approach in some European countries should be clearly distinguished from the more widespread move which places gender equality under a more general equality policy.

#### **4.1.4 Outcomes Associated with Gender Mainstreaming**

This section analyses the outcomes associated with the introduction of gender mainstreaming approaches insofar as it is possible to identify them. This analysis is directed at one of the chief objectives of the research project: to assess how the integration of gender affects policy making, in particular whether and how it acts to improve the quality of policy. A related question is whether, and if so how, gender mainstreaming is superior to other approaches to gender.

This objective was originally divided into two sub-objectives: to analyse the impact of gender mainstreaming on policy-making processes and to analyse the impact of gender mainstreaming on the quality of life of both women and men. However, because in most countries gender mainstreaming is only in the initial stages of development, sufficient evidence is lacking to address the impact of gender mainstreaming on the quality of life of both women and men. Hence analysis in this section will concentrate on the impact of gender mainstreaming on the quality of policy.

The term ‘quality of policy’ has only recently entered policy discourse and thus still lacks a precise meaning. Often, this term has been linked with that of ‘good governance’, a concept that is much more widely used in the political science and policy studies literature. In these contexts, this (normative) term is used to refer to a set of principles or standards to which states (or other institutions) should conform in the exercise of their power. The term ‘good governance’ is also widely used in the context of human development by international organisations such as the UN, the World Bank and the IMF. In the EU context, the Commission’s White Paper on European Governance laid down five principles of good governance: openness, participation, accountability, effectiveness and coherence.<sup>26</sup> There is not a great deal of variation among the principles of good governance given by all of these organisations, suggesting a broad consensus on the meaning of the term.<sup>27</sup>

The concept of gender mainstreaming is increasingly being linked with that of good governance, as evidenced in a number of policy documents, from both national governments and international organisations.<sup>28</sup> A key argument in all of these documents is that gender mainstreaming contributes to better governance and, therefore, that it should be an essential part of any governance strategy.

In order to ascertain whether the research provides any evidence that can support this argument, a series of indicators have been selected, drawing upon the varied definitions of good governance available.<sup>29</sup> These are: transparency, accountability, participation and inclusiveness. It should be noted that the concept of good governance in relation to policy making refers not only to the content of policies but to the nature and range of participating actors, as well as the characteristics of policy institutions. Accordingly, three different subsets of indicators are used:

- In relation to the content of policies, the analysis focuses on the conceptualisation of the equality/inequality problematic, the clarity of policy objectives, the inclusiveness of policies, the evidence-base of policies and their evaluation;
- In relation to the participation of actors focus is placed on the range and nature of participating actors as well as the degree of coordination and collaboration among them;
- In relation to institutions, the main focus of attention is on the reputation and power of institutions, the level of resources available to them, the clarity of their mandate and the quality of their leadership and staff.

At the outset it is important to note that our analysis of the relation between gender mainstreaming and the quality of policy according to these indicators has not been able to establish any connection between the models of gender mainstreaming as described in previous sections and the quality of policy in the countries under study. As a result, analysis in this section will not be model-based but will instead provide a general

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<sup>26</sup> [http://europa.eu.int/comm/governance/governance/index\\_en.htm](http://europa.eu.int/comm/governance/governance/index_en.htm)

<sup>27</sup> For example, the principles of good governance provided by the UN include: accountability, effectiveness, participation, transparency and inclusiveness.

<sup>28</sup> Examples include, among others: the Council of Europe’s report on gender mainstreaming (*Gender Mainstreaming: Conceptual Framework, Methodology and Presentation of Good Practices*, Council of Europe 1998, p. 19); the World Bank’s gender mainstreaming strategy (*Integrating Gender into the World Bank’s Work: A Strategy for Action*, 2002, p. 9).

<sup>29</sup> These indicators were already listed in the methodology report (Deliverable 4) and also informed the design of the interview schedules.

commentary on the relation between gender mainstreaming and the quality of policy according to each of those indicators, supported by particular examples.

Before proceeding with the analysis a number of points have to be underlined. First, the relationship between gender mainstreaming and good governance or quality of policy should not be viewed as one of cause and effect. Our inquiry will rather focus on the question of whether gender mainstreaming practices can be associated with an improvement in the quality of policy according to the indicators listed above. This way of framing the question leaves open the type of relationship. Secondly, in this section the unit of analysis will not be policy in general but gender equality policies in particular. Although the argument in favour of gender mainstreaming has been couched in broader terms - that the approach contributes to better quality of policy in general - this study lacks sufficient evidence to draw definitive conclusions about policy in general. The main reason for this is as stated above that, in the majority of countries included in the research, the integration of gender into policies has not yet gone deep enough.

#### **4.1.5 Gender Mainstreaming and Policy Quality**

As indicated above, this section analyses the outcomes associated with gender mainstreaming in relation to a number of indicators of policy quality. Such indicators concern changes in the content of policy, the level of actors' participation and policy institutions.

##### Gender mainstreaming and policy content and practice

What is at issue here is the extent to which gender mainstreaming is associated with changes in the definition of the policy problematic, the clarity of policy objectives, the policy evidence base, the inclusiveness of policy and policy evaluation practices.

In relation to the definition of the policy problematic, there is clear evidence of changes in the rhetoric of gender equality in most countries, although there is important variation with respect to how much of this rhetoric is translated into action. Thus, a common line of discourse which appears in most gender mainstreaming policy documents across countries is that gender equality is far from being achieved, despite the advances of the last decades and that, therefore, a new strategy is needed. Given that the level of participation of women in all levels of education and the labour market is now close to that of men (if not higher, as in third level education), the problem does not lie in lack of equal access or equal opportunity but, rather, somewhere else.

Two countries where this new problematic is explicitly articulated, although in very different ways, are Spain and Sweden. In Spain the new problematic is identified as being mainly cultural, and therefore requiring a change in values, whereas in Sweden, the problematic is seen in mainly structural terms, and therefore as requiring a change in the pattern of power relations across all sectors of society. In both cases, the belief is that all public institutions must get involved in order to tackle the gender problematic, but for very different reasons. Spanish policy acknowledges that all public institutions have an important role to play in changing social values in relation to gender, although there is no explicit acknowledgement of their responsibility for the enforcement and perpetuation of sexist values. In contrast, the role of public and private institutions in enforcing and perpetuating gender inequalities is fully acknowledged in Sweden. As a result, the focus of

policy in Sweden is on the gender bias in institutional structures and activities while Spain lacks such an institutional analysis in relation to gender.

In most of the countries under study there is no such explicit definition of the gender equality problematic. Thus for example, the UK (central government) takes a much more pragmatic approach in that, while the failure of traditional approaches to reach gender equality are acknowledged (as illustrated by the widening of gender pay gaps, gendered patterns of labour market segregation and so on), policy documents lack a theoretical explanation of the roots of this, concentrating instead on tackling these specific problems, mainly by means of quantitative targets. In other countries, like Belgium, a similarly pragmatic approach is evident, although some of the Belgian measures indicate an implicit awareness of the need to change institutional practices.

To sum up, while in most countries gender mainstreaming has been accompanied by a change, to a greater or lesser degree, in the definition of the gender equality problematic, there is a general reluctance among governments to adopt a discourse of power in their policy documents. With the exception of Sweden, this type of discourse is limited to feminist and women's organisations and independent gender equality agencies. Instead, government discourse on this issue is in most countries a watered-down version, independently of whether a gender mainstreaming approach has been introduced or not.

In relation to the clarity of policy objectives, gender mainstreaming has been accompanied by the formulation of new and specific objectives across different government departments. However, no change has been detected in relation to the general objectives of gender equality policy (i.e., those objectives which are part of a grand vision). Moreover, in many of the countries under study, gender mainstreaming is regarded either as an objective itself or as an instrument to achieve other objectives that have nothing to do with gender equality. In conclusion, therefore, except in one noteworthy exception – Sweden – gender equality policy continues to lack clear overarching objectives in most countries, independently of whether gender mainstreaming has been introduced in the country or not. Given this, the collection of small, piecemeal gender equality objectives that are being introduced in different policy domains (e.g., UK targets) appear fragmented and quite lacking in coherence or rationale.

In relation to whether gender mainstreaming practices have been associated with an improvement in the evidence base of policies, there is no clear evidence of this from the country cases. A common feature shared by the majority of countries under study is that significant progress has been made in the promotion of gender-related research, both quantitative and qualitative. This is evidenced by the fact that most gender equality units dedicate a substantial amount of their resources (in some cases up to 80%) to the commissioning of research on specific gender-related issues, the improvement of gender disaggregated statistics and/or the promotion of gender studies. However, such developments should be regarded as general trends in gender equality policy in the countries under study rather than as direct outcomes of gender mainstreaming. Thus, in countries where progress in gender mainstreaming is quite patchy and fragmented (e.g., UK) or even in those where positive action is the dominant approach, the improvement of gender research and statistics constitutes a clear focus of policy activity in relation to gender.

However, in two particular countries – Greece and Ireland – the introduction of gender mainstreaming has had a clear impact on gender research. Both countries had a relatively



significant gaps in gender research prior to the introduction of gender mainstreaming (the introduction of which, as indicated in the previous section, has been mainly driven by the EU). In Ireland, gender research and the improvement in the availability of disaggregated statistics has constituted the core activity of the two existing gender mainstreaming units (at the Department of Justice and at the Department of Education) since their establishment in 2001. Such research activity (labelled as ‘evidence gathering’) is viewed as a necessary preliminary step to the integration of a gender dimension into policies. In Greece, gender mainstreaming has also resulted in a noticeable improvement in the level of gender research activity in relation to different domains. It has, in addition led to the introduction of a new field of research on gender mainstreaming techniques and methods of policy evaluation.

It needs to be noted, however, that such a heightened level of gender research activity in the countries under study does not necessarily lead to an improvement in the evidence base of policies. Thus, while governments may allocate increased resources to the commissioning of gender research and the production of statistics, this has no impact on policy quality unless it is used in policy making. As one respondent in the research unit at the Spanish Ministry of Education remarked: “We are engaged here in research and not in politics or policy making. Of course, we hope that the results of our research will be taken into account by the politicians, but that is not automatically guaranteed...” Similarly, the Greek research raises the problem of non-use of research and expert knowledge in relation to gender.

In relation to the question of whether gender mainstreaming is associated with more inclusiveness in terms of the focus of policies, the country reports provide no clear evidence. It has been argued that gender mainstreaming leads to more inclusive policies in two respects. On the one hand, it is claimed that this approach takes into account the needs of both women and men, thus moving away from an exclusive focus on women, typical of positive action approaches. On the other hand, it is claimed that gender mainstreaming is a better approach for tackling issues of multiple discrimination.

In relation to the first issue, there is clear evidence in all of the countries under study of a shift in policy discourse from a focus on women to a focus on gender. However, whether this rhetoric of gender versus women is translated into practice is a very different question (despite some exceptions like Sweden). Thus, we find that in some of the countries (for example Belgium) there is a clear use of the term ‘gender’ in policy documents, although most measures are actually targeted at women. Apart from this, there is also evidence in other countries of some exploitation of the term ‘gender’, by politicians and civil servants, as a political stratagem to sidetrack unpopular women’s and feminist issues (e.g., Greece and France). In these countries, therefore, ‘gender’ is preferred to ‘women’ as a more general and vague term (and, therefore, more devoid of meaning). These are countries either with a strong equal treatment tradition and/or where feminism has had a particularly negative image. In any case, despite these trends in policy discourse, gender equality policies in the majority of countries under study are still overwhelmingly targeted at women, regardless of the dominant policy approach (i.e., whether equal treatment, positive action or gender mainstreaming).

In relation to the second issue, mainstreaming strategies in various parts of the UK, as well as Ireland, have a specific focus on the problem of multiple discrimination. In these countries, notions of inclusiveness of policy are at the root of a new approach to equality



policy with a strong emphasis on diversity. In some cases (such as the UK central government) such a concern with inclusiveness and diversity are explicitly connected to a drive to improve governance. A common trend in these countries is a move away from gender in particular to equality in general (sometimes labelled as ‘diversity’). Although one of the justifications for this move is that a general mainstreaming approach is better able to tackle multiple discrimination, it has also been subject to strong criticisms. Thus, there is a growing concern that this approach contributes towards a dilution of gender equality issues, as other discriminatory grounds take priority in policy.

In relation to the question of whether gender mainstreaming can be associated with an improvement in policy evaluation practices, it is possible to establish a clear correlation in some countries. As indicated in the previous section, the concept of gender mainstreaming tends to be associated with gender impact assessment techniques. Hence, the introduction of such techniques constitutes the most distinctive feature of gender mainstreaming in many countries. The impact of gender mainstreaming on evaluation practices is particularly conspicuous in countries with a poor evaluation culture, such as Greece. In countries with a clear tradition of impact assessment evaluations in other domains (for example Ireland), gender mainstreaming has facilitated the extension of such practices to cover gender equality issues.

#### Gender mainstreaming and actors’ participation

As seen in the last section, a common characteristic of gender mainstreaming strategies across Europe is the sharing of responsibilities for gender equality policy across different sectors of society. Such sharing requires the involvement of a large variety of actors and stakeholders, including government and public sector institutions, the private sector and NGOs.<sup>30</sup>

Indeed, in all the countries included in this study (with the exception of Spain),<sup>31</sup> there is clear evidence of an increase in both the number and range of actors participating in gender equality policy associated with the introduction of a gender mainstreaming approach. However, this has principally involved an increase in actors belonging to government administrations (politicians and civil servants in different ministries) and to the wider public sector (public service institutions and other public agencies). An increase in the participation of the private and voluntary sectors has been much less noticeable although, as seen below, Ireland and the UK constitute a notable exception to this pattern.

In widening the net of public sector institutions that are involved in gender equality policy, gender mainstreaming represents a break from traditional gender equality policy, the responsibility for which rested exclusively in the hands of gender-dedicated public agencies. The new gender mainstreaming approach has thus extended responsibility for gender equality to other ministries and public agencies, not only in relation to policy design but also in regard to policy implementation. This has been achieved in two different ways:

- by way of general horizontal gender mainstreaming programmes that involve most government departments. Examples include the Belgian Strategic Plan for Equality

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<sup>30</sup> However it should be noted that such an increase is not always directly linked with the adoption of gender mainstreaming but is rather part of a more generalised move towards a more participatory model of policy making, a model that is being strongly encouraged not only by the EU but also by other international organisations such as the UN.

<sup>31</sup> The lack of social dialogue in relation to gender equality policy during the period of conservative rule in Spain has been thoroughly described in the Spanish research (Deliverable 4).

Affairs, the French Equality Charter, or the UK gender equality targets set out in Delivering on Gender Equality<sup>32</sup>;

- by way of domain-specific vertical gender mainstreaming programmes that involve one or more government departments associated with one particular domain as well as other relevant public sector stakeholders within that domain. Examples include the Greek education programme on gender equality (included in EPEAEK II), the Swedish programme for integrating gender in the health and social services and the French Convention for integrating equal opportunities within the education system.

Although in both types of programme the new participating actors are mainly from the public sector, there are important differences in relation to where they are drawn from. A comparison of the Swedish gender mainstreaming programme in the domain of health and social services and the Belgian Strategic Plan for Equality Affairs clearly reveals these differences. The Swedish programme illustrates how gender mainstreaming is proceeding there, i.e., mainly by way of setting up substantial integration programmes in different policy domains (rather than institutions), involving a very large range of (public) stakeholders within that domain. While this is a programme that stems from the Ministry of Health and Social Services, its implementation takes place in collaboration with a very large number of other actors drawn from government institutions at different government levels (e.g., the Swedish association of local authorities and Swedish federation of county councils). Other key stakeholders in this domain are also involved, mainly drawn from a variety of public agencies (e.g., National Insurance Office, Children's Ombudsman, National Institute of Public Health, National Board of Institutional Care, amongst others). It can be seen that there is a substantial level of joint action concentrated in one domain, which involves a wide range of actors (from national and local levels) that have a stake in that domain.

The Belgian Strategic Plan for Equality Affairs embodies a very different type of approach. It focuses on the integration of gender across different government ministries. Each ministry is responsible for the design and delivery of one or more objectives in relation to gender equality. The implementation of these objectives is facilitated by a pool of academic experts responsible for offering support to the different ministries, and carried out by one designated civil servant in each ministry with responsibility for the objectives' effective implementation.

The main difference between these two programmes is that, while in the former the pool of participating actors is spread vertically – that is, from the ministry(ies) involved in one particular domain down to all the public bodies associated with this domain - in the latter it is spread horizontally – that is, across different government ministries. Therefore, in the former the range of participating actors is wider than in the latter. Other programmes loosely follow one model or the other depending on whether they centre on ministries (UK targets) or domains (French Convention, Greek EPEAEK II).<sup>33</sup>

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<sup>32</sup> As specified in the first section of this chapter, unlike the plans introduced in other countries, this is not a proper government plan or programme on gender equality, but a collection of targets on gender equality previously set by different government departments within the framework of the modernisation of the public services.

<sup>33</sup> The French *Equality Charter* is rather different to any of the other programmes cited in that it is a framework document, establishing the general priorities for action in relation to gender equality. The charter has been signed by a very large range of actors (from public, private and voluntary sectors at different administrative levels) although their role in implementing the principles included in the charter is not specified in the document.

In contrast to the majority of countries under study, where the increase in the number and range of participating actors associated with gender mainstreaming is mainly limited to the public sector, Ireland and the UK provide examples of countries with a high level of participation of NGOs in gender equality policy. In these countries (including the devolved regions of the UK), systematic consultation exercises with voluntary associations, among other stakeholders, are a regular part of the policy-making process. The significance of partnership between the public, private and voluntary sectors in the implementation of equality policy in these countries is such that it has been considered the primary method for the delivery of an equality mainstreaming approach.<sup>34</sup>

An increase in the participation of actors outside the public sector was the subject of much debate during the course of the interviews. Some pointed to the need to bring in actors who are knowledgeable about gender and feminist issues (e.g., from lobbying or voluntary organisations, academia, or both) since civil servants and politicians are rarely either familiar with gender and feminist issues or fully committed to a more gender equal society. Others remarked that these partnerships between the government and the women's movement are not partnerships of equals and, hence, rather than empowering women, they are weakening their power to effect real change (by, for example having to make too many compromises). In Sweden, a concern raised during the interviews was not so much about the negative effects of a partnership between government and women's associations but rather that the Swedish top-down, state feminist, model of gender equality policy is rendering these associations redundant. In the words of this respondent: "In the beginning of the 1990s there were several, autonomous women's organisations in the countryside which, together with democrats, initiated and realised resource centres. But after a few years this became institutionalised in the state, which meant that those women who really were radical are no longer active."

### Gender mainstreaming and institutional change

The introduction of gender mainstreaming approaches to gender equality has generated a fair amount of debate about the impact on institutions, especially those which traditionally have had exclusive responsibility for gender equality policy. On the one hand, there is an argument that gender mainstreaming may be used by governments to curtail the status, remit and resources of gender-dedicated agencies. This concern has been voiced mainly by feminist activists and (feminist) academics and is based on the observation of this type of outcome of gender mainstreaming in a few countries (such as The Netherlands). In contrast to this view, there is an argument in support of gender mainstreaming claiming that it leads ultimately to a change in the remit of gender dedicated units as responsibility for gender equality policy is spread both horizontally (across government and public service bodies) and vertically (down to regional and local levels of the administration). This argument holds that such a change does not necessarily entail a decline in status or in the resources dedicated to gender agencies. Rather, it is claimed that these agencies have an essential role to play in ensuring the effective implementation of a gender mainstreaming approach.

This research provides a variety of examples of how the adoption of gender mainstreaming can effect institutional change. These examples offer evidence that the future of gender

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<sup>34</sup> For example, as noted in the country reports (Deliverable 4), policy making in Ireland is carried out within the framework of social partnership, which includes the voluntary and community sector. In Scotland, a distinctive feature of the implementation of the Equality Strategy is a strong and inclusive partnership approach between the public, private and voluntary sectors.

equality institutions depends not so much on the introduction or not of gender mainstreaming but rather on the commitment of politicians to gender equality. In this regard a comparison of the cases of Sweden, Belgium and Spain is instructive since they represent very different levels of development of gender mainstreaming: Sweden has fully introduced a mainstreaming approach, Belgium is in a transition process from positive action to gender mainstreaming while gender mainstreaming is imperceptible in Spain where policy is still greatly dominated by a positive action approach.

As already indicated, Sweden exemplifies a country where a gender equality perspective is deeply integrated in all spheres of society. Such integration has led to some changes in the remit of the Division of Gender Equality. These changes mainly involve a shift in its responsibilities from policy making to policy implementation and monitoring. Thus, the Division has chief responsibility to ensure the effective implementation of gender mainstreaming across all domains. This is facilitated by the provision of expert and technical support where necessary, co-ordination of initiatives undertaken by the different departments of the administration and monitoring of progress in gender mainstreaming, mainly through regular and institutionalised reporting mechanisms.<sup>35</sup> In regard to its status and level of resources, the Division is at the centre of all policy activity on gender equality (that is if gender equality institutions are represented as a pyramid, the Division would be at the top). There is no evidence of decline in resource allocation to the Division, nor is there evidence of a change in its position within the central administration, as the Division continues to be attached to a centrally located government ministry (Ministry of Interior). In sum, the Swedish case supports the argument that gender mainstreaming requires a change in the remit of gender-dedicated institutions but that, if there is a genuine commitment to gender equality in the country, such change does not necessarily entail a decline in the status, position and/or resources of these institutions.

Belgium is a case where the introduction of gender mainstreaming has been accompanied by considerable changes in gender equality institutions. An argument could be made that such changes represent a significant improvement in a number of respects. In the first place, there has been a change in the status and position of the gender-dedicated institutions. The newly created Gender Equality Institute represents a move in gender equality policy from a unit dependent on a relatively peripheral Ministry (Employment and Labour) to an independent agency accountable to a more central ministry (Public Service, Social Integration and Metropolitan Policy). Secondly, the creation of the Gender Equality Institute also represents a shift in the remit of gender equality institutions. Hence, the main responsibilities of the Institute concern support, co-ordination and monitoring. These are the same roles that were assigned to the Experts' Gender Mainstreaming Unit created during the pilot project on gender mainstreaming. They resemble the functions of gender mainstreaming institutions in other countries (e.g., Sweden). Given this, the Institute's remit indicates a commitment on the part of government to continue to progress the gender mainstreaming process that was initiated during the pilot project. Thirdly, the level of resources dedicated to gender equality policy has undergone a substantial increase in recent years.

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<sup>35</sup> All departments of the administration have to submit periodic reports on progress on gender equality. This reporting process is overseen by the Division.

In stark contrast to the recent improvements in gender equality institutions in Belgium, the main gender equality institution at central government level in Spain<sup>36</sup> has seen a significant decline. The Spanish case is interesting is an example of a steep decline in the institutional base of gender equality which, far from being associated with a change in policy approach to gender equality, has taken place during a period of stagnation of this type of policy. It should be noted that this does not necessarily signify lack of progress towards gender mainstreaming but refers, rather, to lack of progress in gender equality policy, whatever shape or form this might take. Put differently, to make sense of the decline experienced by the Women's Institute in the past few years, recent trends in gender equality policy in the country should be viewed as exemplifying a transition from a healthy positive action approach to a stagnant positive action approach, rather than as a failed transition from positive action to gender mainstreaming. In brief, this decline has had a variety of dimensions involving, inter alia, the Institute's position within the administration, the level of human and financial resources allocated to it, the level of innovation in its programmes and, most importantly, the Institute's management and direction. At the root of this decline is a lack of political commitment to gender equality by the (former) government of the Partido Popular. The rhetoric of gender mainstreaming was occasionally used to justify underfunding of the Institute, and this may be the reason why some of its officials showed a significant aversion to the concept. However, other officials viewed the new gender mainstreaming approach as an opportunity to rethink the remit of the Institute, to change its position within government to a more central one and also restore its old status and prestige.

## **4.2 COMPARISONS BETWEEN NATIONAL AND EU APPROACHES TO GENDER EQUALITY POLICY**

Drawing on the country case studies and an analysis of the development of EU gender equality policy, this chapter aims to identify and understand the influences of EU and international policy on national approaches to the integration of gender equality in public policy, as well as the similarities and differences between EU and national policies on gender equality.

### **4.2.1 Influences of EU and International Policy on National Approaches**

#### Influences of the EU on National Approaches

With the exception of Sweden and the UK, most actors in gender equality policy in the case study countries indicate clearly that EU gender equality policy has influenced national approaches. This is supported also by the policy analyses, which show the influence of specific aspects of EU gender equality policy on the development of national policies. In most countries there is broad consensus among actors on the degree, nature and source of the influences, although in two countries there are some variations by policy domain and type of actor.

The influences are both general and specific. In general terms, EU gender equality policy has been a 'support' and has given gender mainstreaming 'legitimacy' and 'credibility'. In Ireland, for example, EU gender equality policy has been used by national actors as a

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<sup>36</sup> Again, it should be noted that these developments in Spain refer to the years prior to the recent change of government after the March 2004 election. It should also be noted that they refer only to the Women's Institute located in the central administration.



‘lever’ to reinforce and add legitimacy to arguments for improvements in national policy. Some actors in Belgium argue that the EU has been a ‘driving force’ in the area of equal opportunities between women and men, and that “without the EU Belgium would not have made... efforts to integrate the gender mainstreaming strategy into Government policy.”

EU gender equality legislation is identified as having had a particularly positive influence on national policy development, both in countries which had previously lagged behind in terms of sex equality legislation, such as Ireland and Greece, and in Sweden, where actors indicate that the sex equality Directives have been ‘positive’. As a leading actor in Belgium notes: “the EU imposes standards to which Belgium adheres”. Although views amongst actors in the UK differ, here too EU legislation is identified as a positive influence; indeed, the evidence of policy development in the UK does not justify an alternative view.

EU gender equality legislation in the form of the sex equality Directives has also been a positive influence on the development of gender equality policy in the new Member States. The alignment of national law with the *acquis communautaire* has contributed decisively to the creation in the ten new Member States of institutional bodies and legal mechanisms that support gender equality objectives, including the adoption of equality legislation on issues of equal pay, parental leave, health and non-discrimination in the workplace, the elaboration and amendment of labour codes and the creation of government offices on equal opportunities.<sup>37</sup> Actors in gender equality policy in Lithuania acknowledge the positive effect of accession negotiations, but they also note that it arrived late on the agenda and that greater priority was placed on social and economic reforms. Many felt that EU directives are leading to an overemphasis on economic considerations at the expense of much needed attention to other areas that are of great concern to women.

However, actors observe both a softening in the use of legislation and a trend towards a less progressive EU equality agenda. There has been a decline in rulings of the European Court of Justice since the late 1990s<sup>38</sup>, and a decline in reporting by the European Commission on its follow-up actions<sup>39</sup> even though, as is pointed out by a member of the Equal Opportunities Unit: “there are many complaints about non-implementation of national legislation on sex equality and the legal sector in the Unit is always dealing with this” and, with the accession of ten new countries, all of which have been required to transpose the equality Directives into their national legislation, the follow-up and reporting on national implementation would continue to be a fundamental task of implementing EU gender equality policy. A view of some members of the network financed under the Fourth

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<sup>37</sup> WIDE (2003) *Towards EU Accession: Forward Looking Strategies for Gender Equality*, WIDE Bulletin, December 2003.

<sup>38</sup> In 1998, there were 11 significant judgements by the European Court of Justice in the area of equal treatment; in 1999, there were seven rulings and in 2001 only three rulings, as reported by the Commission in its annual reports on equal opportunities between women and men. The Commission makes no mention of further rulings in its 2004 Annual Report on equality.

<sup>39</sup> Prior to 2000, the Group of Legal Experts had reported to the Commission on infringements of EU law by member states, but, under the Network’s contract with the Commission for the current period (2000-2004), this task was discontinued (source: Annick Masselot, Coordinator of the Network of Legal Experts, *pers. comm.*). Since 2000, the European Commission has stopped reporting on its follow-up actions concerning the national implementation of equal opportunities legislation in its Annual Reports.



Programme is that mainstreaming has deflected the Commission from its role of enforcement.<sup>40</sup>

Moreover, attempts to further strengthen equality rights for women and men by enacting an equal treatment Directive in areas other than occupation and employment have so far not succeeded.<sup>41</sup> Noting the weaknesses of this proposed new equality directive, a respondent involved in gender policy in Scotland saw this as an indication of the waning of the ‘progressiveness’ of the EU equality agenda.

Financial support for positive action and gender equality measures has been a particularly strong influence on national policy development (or at least on national initiatives or programmes) in many countries and in certain policy domains (e.g. education). Without EU financial support, these programmes and initiatives would not have taken place, or not to the same extent. The European Structural Funds have been especially important as a positive influence on national programmes to support positive action and equal opportunities for women and men, notably in Belgium, Greece, Ireland, Spain and the UK. The obligation to mainstream gender and to integrate positive action measures in Structural Fund programmes during the current programming period (2000-2006), as a condition of EU co-funding, has forced governments to respond, overcoming significant resistance by some members of national governments. Equality and women’s organisations were able, during the formulation of the national programmes at the end of the 1990s, to use a combination of moral and instrumental arguments (respecting commitments on equality, particularly those in the Treaty of Amsterdam, and meeting the requirements of EU financing) in support of gender mainstreaming and equal opportunity measures. At that point, they were backed up by more active support from within the European Commission, with some Commission officials responsible for negotiations with the member states making efforts to ensure that the regulations and requirements on gender equality were met within the regional and national programmes for which they had responsibility.

Support for positive action at EU level is, however, observed by a number of respondents to have waned, and some argue that gender mainstreaming has been associated with a curtailment in the use of positive action as an instrument of EU gender equality policy. Respondents in Spain express the view that the rise of gender mainstreaming has been accompanied by a systematic cutting back on and lowering of the profile of certain positive action programmes. A number of references were made in interviews to the Daphne programme on violence against women, with respondents expressing disappointment that the budget for the programme was cut. The argument that gender mainstreaming has been associated with a curtailment of positive action as an instrument of gender equality policy is supported by an analysis of the introduction of the gender mainstreaming approach in the Commission.<sup>42</sup> The introduction of the “dual-track” approach (mainstreaming and positive

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<sup>40</sup> Reported by the final evaluation of the Fourth Medium Term Action Programme on Equal Opportunities between Women and Men (Labour 2001, p.42).

<sup>41</sup> First proposed in 2000, a Proposal for a Council Directive on equal treatment between women and men in access to and supply of goods and services was finally adopted by the European Commission in November 2003, but – due to resistance by many Commissioners – has a narrower scope than initially envisaged. It has met with strong opposition from the insurance industry and few member states actively support it. As at August 2004, no agreement has been reached on the text in the Council.

<sup>42</sup> Stratigaki, M. (2004) *Gender Mainstreaming vs. Positive Action: An On-Going Conflict in EU Gender Equality Policy*, paper presented to the ECPR Second Pan-European Conference on EU Politics, June 24-26 2004, Bologna, Italy.

action) by the EC's Equal Opportunities Unit was a response to attempts to replace positive action by mainstreaming. However, the latter has still been used to argue against specific actions and specific institutional mechanisms.<sup>43</sup>

Concerning the influence of more recent EU policy approaches, the views of national actors become more varied, and more critical, compared to the fairly consistent appreciation of 'older' approaches. A respondent in the Basque Country expressed such mixed perception as follows: "In the main EU equal opportunities policies have a favourable reception. We are pleased when we know that the EU is going to pass measures that are going to affect equal rights policies and we are pleased that it serves as a reference and gives backing to what can be done here. However, the policies seem to us to be very limited and we have noticed in the last ten years a significant degree of stagnation in Europe." Indeed, many of those involved in gender equality policy at both national and EU levels express considerable 'disappointment' and 'discontent' about the direction and pace of gender equality policy. They point to the more limited action and a move to more 'decaffeinated' concepts and approaches. A respondent in Andalusia was of the view that EU policies "have a more conservative cast to them" and, with reference to the Framework Strategy for Gender Equality, "a certain stagnation compared to other periods".

While there is clear evidence and acknowledgement of the influence of the EU strategy of gender mainstreaming on national approaches (e.g. in Belgium and Ireland), and of the added status of gender mainstreaming in national policy as a consequence of EU support (even in Sweden), doubts are also expressed about whether gender mainstreaming is a positive influence on national policy. Echoing views expressed elsewhere also, respondents in Ireland suggested that gender mainstreaming is too 'soft' to be effective and may have been 'oversold'. Moreover, it may even have negative influences, through its administrative requirements and the risk of prompting antagonistic reactions. Respondents in Lithuania also indicate concerns about the possible negative impact of soft gender equality mechanisms. Notably it is in Sweden, where gender mainstreaming is the national strategy, that EU support for gender mainstreaming is considered to have had a positive influence, but through adding status to the national policy rather than influencing the policy design per se. In this respect, Swedish actors consider that there has been at least as much influence of national policy on EU policy as vice versa (and this is borne out by the evidence of Swedish, and more broadly Nordic, influences on EU gender equality policy during part of the 1990s). However, the influences are seen at national level mainly in that policy makers at local level in Sweden are not aware of EU policy.

In some policy domains, the influence of EU policy is considered weak, and in some cases negative. In Greece, the influence of EU policy on gender equality in national pensions policy is weak and indirect, but also negative for the situation of women in the pensions system. The focus on individualisation of rights, both within EU gender equality policy and the Open Method of Coordination in the area of pensions, is not seen by some actors in Greece as bringing positive benefits, at least not for the women that these organisations represent. A similar situation obtains in Lithuania, where women's organisations identify negative consequences of EU policy on women in social security and pensions systems.

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<sup>43</sup> For example, the creation of a specific unit on gender equality in the Directorate General for Education (DG EAC) was proposed, but was not supported by Commissioner Reding - a member of the Group of Commissioners on Equal Opportunities - because, it was argued, a network of gender mainstreaming officials existed within the DG.

In the context of joint processes of decision making and ever closer linkages between the administrations involved in policy implementation (particularly the case for social policy, which is the responsibility of the member states), EU policy objectives become more and more a common denominator or generic standard and less and less a way of raising national standards through the setting of EU benchmarks. The general move away from binding legislation to soft laws and open methods of coordination on policy, which require greater consensus at EU and member state levels, is a barrier to advancing gender equality, particularly when combined with political changes at national level and the hegemony of neo-liberal economic policies across Europe. Commenting on gender equality policy and the Open Method of Coordination, an academic and feminist from Greece argues that the real aim of this EU strategy “is to reconcile social with economic policies (implementation of single market and currency), than to coordinate and influence social policy reforms...”

Concerning the future, there is pessimism amongst some actors who have good knowledge of EU policy about the future role of the EU in leading on gender equality policy. In the words of one respondent in Spain: “the EU has stopped functioning as a reference for gender equality”. There is a noted decrease in the ability of the European Commission to negotiate policy at European level<sup>44</sup> and to provide informed insight on gender equality issues and policy. Spanish participants in gender equality policy now view the EU as offering very little value in terms of knowledge. Even interviewees who are supportive of the concept of gender mainstreaming do not consider the EU as a source for a better understanding of the problematic of equality or inequality. One respondent, with knowledge and direct experience of the Commission, claimed that there is a lot of confusion in Commission circles about the concept of gender mainstreaming:

“There is a great need for training...of officials in the European Commission. It’s clear that there are many times when Commission officials simply don’t have a clue. This is palpable in the attitudes of people, in their comments, in their gestures, in their responses... I am often with colleagues in the EC who are considered experts in the field of gender mainstreaming, and they have nothing to teach me; not me, not the people at Emakunde<sup>45</sup>, not the Andalusian Women’s Institute, not women’s organisations”.

### Influences of International Policy on National Approaches

The influences of international policy on national approaches to gender equality appear to be three-fold: the general influence of the Beijing conference in 1995 and the Platform of Action, to which all EU countries are signatories, on the introduction or reinforcement of gender mainstreaming; international influences on the development of gender mainstreaming methods and tools; and more specific influences, especially in the enlargement countries, of international agencies and regional bodies, many of which have adopted gender mainstreaming as a strategy, but which also strongly emphasise women’s rights, women’s empowerment and positive action.

The Beijing conference in 1995, and the preparations leading to it, gave a significant impetus within Europe to progress on gender equality policy and gender mainstreaming in particular, both within the European institutions and across member countries. Coinciding

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<sup>44</sup> This has been particularly visible, according to informed observers at EU level, during the negotiations between the Commission and member states on the proposed new Directive on equality in goods and services.

<sup>45</sup> The Women’s Institute for the Basque region in Spain.

with the accession of Sweden (along with Finland and Austria), the Beijing Conference marks a turning point in the character of gender equality policy and its implementation in the EU, and a significant influence on the increasing congruence of gender equality policy at national and EU levels.

International approaches have also had an important influence on the development of instruments for gender mainstreaming, most notably tools for gender analysis and gender impact assessment and, more recently, the use of gender budgeting. The gender budgeting initiatives by Emakunde in Spain and by the UK Government draw on international experiences (e.g. in South Africa) and international expertise.

In Lithuania, positive influences are identified as a result of actions and support by UNDP, the Swedish International Development Agency, the Nordic Council, the Open Society Fund and also PHARE (the EU programme of support to countries of eastern and central Europe), on the development of networks, information, learning and sharing of knowledge in the areas of women's rights and gender equality. The approaches underlying much of this support suggest the existence in Lithuania of at least differing, if not contradictory, perspectives on gender equality as a result of the multiple external influences. This may explain the critical views of many gender equality actors about EU policy and its economic focus. Exposure to discourse and approaches that place gender equality within a context of human development and rights gives non-governmental actors and academics a broader perspective on gender equality than that advanced within EU policy.

#### **4.2.2 Similarities and Differences between EU and National Policies**

The variations in the current state and constituents of gender equality policy in the study countries presented in Chapter 3 are played out at European level also. The interdependence and interaction of the European and national systems within the overall system of governance in the EU, and the highly dynamic character of the latter since the early 1990s, inevitably mean a complex state of affairs, whereby similarities and differences change over time.

##### Policy Objectives

Concerning policy objectives, the variations visible at national level amongst the study countries are reflected in the variations and contradictions evident in EU policy objectives on gender equality. The EU shares with Sweden the existence of overarching objectives on gender equality, to which all policies and programmes should contribute, as well as acknowledgement – at least within core texts on current gender equality policy - of the structural aspects of inequality. Following the Treaty of Amsterdam, EU policy objectives are clearly stated as ‘gender equality’, including reduced inequalities between women and men, which should be mainstreamed into all Community policies. Moreover, the EU Framework Strategy on Gender Equality (2001-2005) aims to “address the challenges of bringing about the structural change required for achieving gender equality”.<sup>46</sup>

Nonetheless, unlike Sweden, the objectives of gender equality in specific domains of EU policy, such as education or social protection, do not conform to those at general level and

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<sup>46</sup> Commission Communication, *Towards a Community Framework Strategy on Gender Equality (2001-2005)*, COM(2000) 335 final of 7.6.2000, p.4

in this respect are more similar to cases such as the UK where gender equality objectives are connected with other general policy objectives (notably employment and productivity). With respect to tax and benefit systems, the Commission noted in 2004 that they both “need to be reformed...to remove disincentives and to provide financial incentives for women to take up, remain and return to work”.<sup>47</sup> EU education policy contains no specific objective regarding the promotion of equal opportunities between women and men; where the issue of equal opportunities for women and men is mentioned, it is in the specific context of the European Employment Strategy and the Lisbon process of social inclusion.

The timing of the formulation of EU objectives helps to explain this apparent anomaly, with the general EU policy objectives on gender equality being elaborated at a moment when the influences of international and Nordic approaches to gender equality were strong, whereas current EU policies on education and social protection (and social policy in general) have been elaborated in the framework of the Lisbon priorities, which are closely aligned with the dominant ethos of some national policies, notably, but not only, in the UK.

In addition, the trend towards non-discrimination and away from the promotion of equality, and towards the integration of all equality and anti-discrimination policies and mechanisms that is already underway in some member states, such as the UK, is also visible at EU level, witnessed for example in the Commission’s 2004 Green Paper on equality and non-discrimination.

Moving to objectives connected with gender mainstreaming, EU policy can be regarded as an amalgam of national approaches, ostensibly aiming to ensure that all Community policies and programmes contribute to reduced inequalities and improved equality between women and men and tackle the structural roots of gender equality (as in Sweden), but being implemented either as an objective in itself (witnessed in many of the operational objectives of the EU Framework Strategy on Gender Equality (2001-2005)) or to meet other – primarily labour market and productivity – objectives. The ‘productive’ aspects of gender equality have become increasingly dominant, in discourse and in practice, and the main progress has been in the areas of the European Structural Funds, Employment Strategy and women in science.

#### Medium of Gender Equality Policy

One of the common media of gender equality policy at EU and national levels is equality legislation. This is perhaps not surprising given that EU Directives must be transposed into national law. Moreover, their implementation is monitored at EU level, albeit less strongly in recent years as compared with heretofore. Anti-discrimination legislation in employment and education, which are the areas addressed by the EU sex equality Directives, is at the forefront here. An interesting feature of recent developments in some countries is the introduction of equality legislation extending beyond employment-related areas, to cover public services and facilities (as in Ireland) and the private sphere (in Spain). These kinds of developments take national legislation in some countries beyond that achieved so far at EU level, where the long-proposed and hotly-contested Directive on sex equality in goods and services has yet to be approved. Ireland had hoped that this could be adopted under its 2004 Presidency but it had to be set aside due to insufficient support from other member

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<sup>47</sup> Report from the Commission on equality between women and men 2004, p.8



states. This too is indicative of the changing balance of influences at national and European levels. Here we have a case of a Directive that had been proposed by the European Commission in 2000 (on the basis of Article 13 of the Treaty of Amsterdam), the adoption of which had been supported by the Advisory Committee on Equal Opportunities (composed of national government representatives) and by the Women's Rights Committee in the European Parliament and other actors, but could not be achieved against the opposition of some member states and representatives of the industrial sectors concerned.

The inclusion in some national legislation of positive action (e.g. Greece and Ireland) also takes some national policies beyond the scope of EU legislation as interpreted by rulings of the European Court of Justice, which have made it difficult to pursue positive action and reduce structural inequalities between women and men, even in the field of employment and in spite of the new Article 141(4) of the Treaty of Amsterdam.

The use of plans for gender equality, which specify a number of objectives and measures in relation to gender equality to be implemented in different areas, and which often indicate institutional responsibilities for implementing the measures, are also a common feature of national and EU media of gender equality policy. Organised by priority theme or by department (Commission service or Ministry), the EU and many national plans were intended to provide a coherent and systematic framework for the planning and monitoring of objectives and actions across policy domains, as part of a global gender mainstreaming strategy.

Although the Framework Strategy and the annual Work Programmes of the Commission services started out as plans of actions to be implemented and monitored (albeit often incorporating actions already underway or planned), and were intended to inspire similar initiatives at national level (for example through their publication on the Commission web site), they appear to have rapidly lost effectiveness as a tool for the implementation of gender mainstreaming within the European Commission or to inspire national initiatives.<sup>48</sup> There are similarities here with some of the study countries, which have launched national plans as once-off events (e.g. Belgium and Lithuania to respect EU requirements) or have been unable to sustain follow-up once the launch was over (for example, the national strategy launched under the Jospin government in France). Spain is exceptional in terms of its long tradition of equality plans and the fact that the plans have tended to be embedded in well-resourced institutional structures.

Gender analysis and impact assessment, the main tool of gender mainstreaming in Sweden, has been a strong component of the gender mainstreaming approach at EU level. One can trace this to the influence of the early development of the gender impact assessment tool in the Netherlands, its inclusion in the influential gender mainstreaming approach of the Council of Europe and its adoption in other countries inside and outside the EU (Sweden,

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<sup>48</sup> Recent Work Programmes have not been published and, as noted by the European Parliament in 2003, there have been both delays in implementation of actions proposed by the Commission services and evidence that a number of Commission departments are neither integrating gender into their policy nor undertaking specific policy actions (*Report on Equal Opportunities for Women and Men in the European Union*, A5-0481/2003 of 17 December 2003, Committee on Women's Rights and Equal Opportunities, European Parliament).

Canada) in the 1990s. Gender impact assessment has most notably been used as an instrument of gender mainstreaming in the European Structural Funds (for ex-ante assessment during programme formulation) and as part of the ‘women and science’ strategy in DG Research, during implementation of the 5<sup>th</sup> and 6<sup>th</sup> EU Framework Programmes for science and research (gender impact assessments of the FP5 specific programmes and, in the near future, gender monitoring of research actions within FP6).

Consultation structures have increased at EU level as part of the implementation of gender mainstreaming, with additional intra-institutional mechanisms for coordination and mechanisms introduced within the European Commission and more recently in the European Parliament, and an additional EU-national consultation mechanism introduced in the form of the High-Level Group on Gender Mainstreaming (composed of national government representatives and EC officials, which meets twice a year in conjunction with the Presidencies). However, consultation mechanisms involving non-governmental actors have not been strengthened at EU level, and opinions expressed through pre-existing consultation mechanisms involving national actors, such as the Advisory Committee and experts networks, have been increasingly sidelined.

### Institutions and Actors

The basic nature of the institutional set-up for gender equality is similar in the eight study countries and at EU level, with a specific unit or department responsible for gender equality policy, either in relation to policy formulation and/or implementation. As is the case at national level, the Equal Opportunities Unit in DG EMPL has no sanctioning powers vis-à-vis other services in the Commission, and is located at a relatively low level in the institutional hierarchy.

Playing a somewhat similar role as the national equality ombudsmen (e.g. in Lithuania, Sweden and the UK), the Commission does have the role of monitoring the implementation of EU gender equality legislation and the power to take legal action against member states for the non-transposition and non-implementation of EU Directives. The European Court of Justice has played a key role in establishing the scope – and limits – of EU legislation at EU and national levels.

The variation between the study countries in terms of the administrative autonomy of the gender equality institutions has a parallel at European level in the proposed changes in institutional set-up. In particular, the future creation of a European Gender Institute<sup>49</sup> is similar to some national structures, such as for example the Equality Institute in Belgium. It is intended to complement the existing structures within the European Commission. However, it is being created with no new additional resources and, in a context of declining political support for gender mainstreaming within the Commission, could lead to a transfer of some of the Commission’s current functions of implementing and monitoring EU gender equality policy to an ‘arms-length’ agency, with a purely advisory role and with less ability to directly influence policy development and implementation.

Concerning the status and position of the head of the gender equality institution, there is no dedicated European Commissioner or even Commission Director for gender equality at an

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<sup>49</sup> A proposal to create a European Gender Institute was adopted at the EU Summit on 17-18 June 2004, following a long gestation period. As outlined, the Institute should ‘act as a source of expertise and learning’ and ‘support implementation of gender mainstreaming’.

equivalent level to the ministers for gender in Belgium, Sweden and the UK. Gender equality is the responsibility of a Commissioner for Employment and Social Affairs (comparable to the situation in Lithuania) and forms a small part of a very extensive policy portfolio, covering a broad swathe of employment and social policy domains. Although under the future Commission (2004-2009) the post is more broadly-named as the Commissioner for Employment, Social Affairs and Equal Opportunities, its position within the Commission is relatively peripheral, not forming part of the 'inner circle' of Commissioners nominated as vice-Presidents.

With respect to actors, as at national level, the 'government' constitutes the main actor in EU gender equality policy. This is, on the one hand, the European Commission and its services and, on the other hand, official representatives of member state governments, who dominate in the various policy advice or policy-making structures at different levels (the Programme Committee, the Advisory Committee, the High-Level Group, the Council of Ministers). Other actors, such as the European Parliament (primarily through the Women's Rights Committee), the European Women's Lobby and the European social partner organisations give opinions and are consulted, but are (increasingly) peripheral to decision-making processes. In a sense, the EU appears to combine the situation in countries such as France and Spain, where government has a near-total monopoly on public policy on gender equality, and countries such as the Ireland, Sweden and the UK, where there are officially-recognised regional or national advisory bodies on women's affairs or gender equality, which are consulted during the policy process. Once again, there have been changes over time, with a narrowing of the range of actors involved in and consulted about gender equality policy since the mid to late 1990s, when a wider range of actors - including national officials, national and EU experts, and civil society actors - were involved in consultation on gender equality policy at European level.

The influence of academic experts and senior female politicians at key moments in the policy trajectory, which is visible in countries such as Belgium and Greece, is also evident at EU level. The presence of three supportive female Commissioners in the 1995-1999 Commission (Germany's Monika Wulf-Mathies, the Swede Anita Gradin and Edith Cresson from France) played an important role in pushing forward gender mainstreaming in key EU policy areas during this period. During the 1999-2004 period, the Greek Commissioner for Employment and Social Affairs, Anna Diamantopoulou, has been a vocal supporter of women's rights and gender equality, but has had limited influence, a reflection both of her position and power in the Commission hierarchy and of a more difficult policy environment within which to advance gender equality.

The involvement of leading national actors in the Women's Rights Committee of the European Parliament's during the same period (Anna Karamanou from Greece, Miet Smet from Belgium, Geneviève Fraisse from France and Lissy Gröner from Germany) is an indication both of the intimate connections between national and EU policy processes and actors and of the relative powerlessness of the European Parliament to influence the development and implementation of EU gender equality policy. As at national level, influential individual actors have played an important role at key moments in the policy trajectory at EU level, but without sustained institutional support and mechanisms, their influence can be short-lived and limited to particular policy domains.

Academic experts have also played a role at EU level, as is the case in some countries, and the use of European networks of experts to provide knowledge and information and to

advise the Commission on the development of national gender equality legislation and policies was an important part of the institutional set-up of EU gender equality policy in the mid 1990s. Now reduced to two, and with a more limited role, their continued influence is due, at least in part, to the involvement of leading academic experts, with known expertise in the policy domains addressed, in the networks.

### Progress

Concerning progress in gender equality policy and in implementing gender mainstreaming, there are similarities between the EU and all of the study countries except Sweden. The EU has, like Belgium and Ireland and some regions of Spain and the UK, gone beyond a purely formal commitment to introduce a gender mainstreaming approach, and has set in place some of the components of this approach, including new structures, disaggregated statistics, assessment tools and administrative procedures to plan and monitor implementation. Unlike these countries however, the range of actors involved in EU gender equality has not been broadened, and has, in fact, been narrowed.

However, on more recent evidence, the degree of progress at EU level bears greater similarity to the situation in France, Greece, Lithuania and the UK, where, except for a few initiatives, there is little evidence that the approach is being implemented. As already noted, there are significant delays in implementing the Framework Strategy and annual Work Programmes. Instruments and procedures for gender impact assessment are not developed, or are not used, and there is a decline in human and financial resources allocated to the implementation of the strategy and action programme. Even in policy domains where significant progress was being made (such as science and research or the Structural Funds) recent evidence suggests a narrowing of gender equality objectives and a waning of effort in implementing previous commitments. In several policy domains, gender mainstreaming is being reduced to 'equal participation of women and men' in actions. This is already the case in education and is emerging as the future approach in science and research.

One also sees evidence of a similar fragmentation of gender mainstreaming efforts at EU level, with the most successful efforts confined to specific domains, predominantly those relating to the labour market (employment, the Structural Funds, education, science and research) and not yet reaching across the full spectrum of policy domains, as indicated clearly in EU gender equality objectives and gender mainstreaming strategy. Efforts to take gender equality into non-employment-related policy areas have been so far largely unsuccessful.

As observed in most of the study countries, and as noted above at EU level, progress in gender mainstreaming has often resulted from the efforts and perseverance of individual women in key positions of power, rather than as a consequence of a high-level decision to follow through with policy commitments. A major influence on the progress in EU policy during the mid to late 1990s were the combined, and often coordinated, efforts of women occupying key positions of power within the institution (Commissioners, Directors, Heads of Unit) and influential and vocal actors in other European institutions and outside (European Parliament, civil society, academics).

At EU level, however, it has required more than one individual woman, even one as high in the hierarchy as a Commissioner, to bring about progress in a particular domain.

Commitments by some individual Commissioners (e.g., Michaele Schreyer on gender budgeting) have not been carried through into action, and progress has only been made through the efforts of several women (and occasionally men) located at the upper levels of the hierarchy (Head of Unit and upwards), and even then only in policy domains where gender equality can be argued to contribute to other policy priorities (productivity, competitiveness, employment).

In effect, there is an increasing gap between the rhetoric on gender mainstreaming and actual practice at European level, making it similar in this respect to member states such as Greece and Spain. Although Lithuania differs from the other study countries in that gender mainstreaming is not part of governmental policy practices, this absence may result from the fact that negotiations on accession focused on adoption of the *acquis communautaire* (the binding sex equality legislation and mechanisms to support its implementation) and that, as part of the 'soft' and open methods of policy coordination and alignment, gender mainstreaming was not required. Recent evidence, such as the use of the gender indicators agreed as part of the gender mainstreaming approach under various Presidencies, suggests an increasingly 'hands-off' approach by the Commission where gender mainstreaming is concerned.

The existence at EU level of a Framework Strategy, annual Work Programmes and a programme of actions articulated around priority themes makes it similar to countries such as France and Spain. The Work Programmes are produced by the various Commission departments, and are somewhat similar to the plan of action within the French Equality Charter. Unlike the Charter though, the Work Programmes are produced by staff within the Commission, with no external consultation, and often by staff who, although having responsibility for gender mainstreaming through their role as gender mainstreaming official, do not have the authority to ensure implementation. The Framework Strategy and Work Programmes provided a visible demonstration of the Commission's efforts to mainstream gender at the time of their launch, but within only a couple of years of their introduction have become less visible and less implemented.

The reasons for the apparent difficulty in sustaining the gender mainstreaming approach at EU level differ in many respects from those in some of the study countries, such as Greece and Spain. However there might be two common reasons: the difficulty of achieving collaborative work across departments or agencies due to power struggles and competition and the existence of a patriarchal culture within the Commission, whereby gender mainstreaming does not serve the interests of those in power. A specific factor at EU level is the narrower policy agenda overall compared to national level, the result both of the historic origins of the EU and recent political trends, and the increasing hegemony of economic policy objectives.

Changes in the broader policy and political environment have been other important factors. We point especially to two parallel policy developments since the early 1990s. On the one hand there has been a stronger development of social policy in general, with more robust policy commitments, as expressed in the Treaty of Amsterdam, a more systematic approach and support for action programmes. On the other hand, the economic agenda that led to the Lisbon goals and process was taking shape at exactly the same time. Supported by much more powerful forces, at both EU and national levels, the goals of economic and employment growth have come to dominate political priorities and processes, co-opting other 'policy priorities' as mere instruments of the higher economic goals.



This increasingly instrumental approach to gender equality parallels the direction that EU social policy as a whole has taken over this period. The guiding principle of the Social Policy Agenda, agreed at the Nice Council meeting in December 2000, is to strengthen the role of social policy as a productive factor. The Agenda points to the positive economic effects of health and education expenditure and social transfers covering pensions and social security. Gender equality has also been presented in the same light.<sup>50</sup>

Viewed in this context, gender mainstreaming is well-adapted to serve the interests of EU social policy, through its focus on the integration of gender equality in policies and programmes (as opposed to their adaptation or transformation), and its methods (impact assessment, monitoring, evaluation) and instruments (indicators, statistics), which closely mirror those being used to implement the Lisbon goals. Of course, if applied as intended, and as laid out clearly in EU guidelines, gender mainstreaming does have the potential to reshape policies and programmes in the interests of gender equality. However, the implementation of gender mainstreaming thus far is not meeting policy commitments at EU or national levels.

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<sup>50</sup> Rubery, J., Humphries, J., Fagan, C., Grimshaw, D. and Smith, M. (1999) *Equal Opportunities as a Productive Factor*, Study for the Policy and Perspective Group of DG EMPL, European Commission. [http://europa.eu.int/comm/employment\\_social/employment\\_analysis/gender/equal\\_opps\\_as\\_prod\\_fact.pdf](http://europa.eu.int/comm/employment_social/employment_analysis/gender/equal_opps_as_prod_fact.pdf)



## Chapter 5

### Conclusions

This final chapter outlines the main conclusions of the research and the key conclusions for European and national policy on gender equality.

#### 5.1 MAIN RESEARCH CONCLUSIONS

##### 5.1.1 Progress in adopting and implementing gender mainstreaming

In relation to progress, our results suggest that progress is slow and uneven. Along with the work of Mackay and Bilton (2003), this research indicates that, while there has been much innovation in developing gender mainstreaming, progress has been uneven within and across countries.<sup>51</sup> Three of the eight countries in the study – Belgium, Ireland and Sweden – can be said to show clear evidence of having introduced or being in the process of introducing gender mainstreaming. There is evidence in these countries of a change in the understanding of the inequality problematic, as well as of the establishment of new policy practices, techniques or institutions with the specific aim of integrating a gender perspective into policy making across different domains. However, there is significant variation amongst them also, with Sweden by far in the vanguard. In the other countries, especially France and the UK (at central government level), and to a lesser extent Greece and Spain (the latter also at central government level), gender mainstreaming efforts while present are highly fragmented, being confined either to a particular domain or to a specific programme within a domain and disconnected from general governmental policy on gender. Lithuania is something of a case apart by virtue of its particular history and also the steepness and depth of the transition that is currently required.

In terms of dissecting developments, one general trend is for countries to spread responsibility for gender across units or departments and indeed in some cases to outside the public service to civil society organisations. This could be read as a move away from the centralisation of responsibility for gender. It is being effected in different ways. In some countries ‘decentralisation’ is being achieved through the revision of equal treatment legislation in order to involve all public bodies in anti-discrimination policy (Ireland, UK); in other countries it is being achieved through the design of ‘transversal’ action plans on gender equality (Belgium, France, Greece, Lithuania and Spain), while in a third case it is being achieved through the systematic use of gender analysis tools in the design and implementation of all policies (Sweden).

Transversalism, albeit in different forms, is quite a widely-used response or strategy, especially through action plans that assign responsibility to different units for the delivery of different objectives. The research underlines the need to scrutinise transversalism carefully, however. While it appears to be synonymous with gender mainstreaming and indeed in many of the national documents is used interchangeably with it, it is quite different. First, it involves no necessary change in policy-making structures or practices and, secondly, gender equality continues to be designated as a distinct or separate policy

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<sup>51</sup> Mackay, F. and Bilton, K. (2003) *Learning from Experience: Lessons in mainstreaming equal opportunities*, University of Edinburgh: Governance of Scotland Forum.

space (even though each department or unit might come under transversalism to be assigned gender equality objectives). Transversalism does not integrate gender into the core of policy then, but tends to add it on as an additional objective or consideration.

Another trend is for countries to treat gender mainstreaming in an ‘a la carte’ manner, adopting selectively some of the components of gender mainstreaming, especially some of the tools or techniques, without an overall framework. Then, gender mainstreaming comes to be seen or represented mainly as a procedural matter that is devoid of or can be divorced from more political objectives. Sweden is the exception in this regard in that it has in place an entire ‘package’ in the sense of acceptance and prioritisation of gender equality as a goal of policy in itself and the integration of the range of relevant procedures of gender mainstreaming across levels of administration.

In terms of which components or methods are favoured, the research reveals that in many countries gender mainstreaming is regarded as more or less synonymous with gender analysis of policies. This in turn is understood in a technical way, mainly as gender impact assessment of policies or of budgets. Hence when some countries say that they are going to introduce gender mainstreaming, what they mean by this that they are going to subject their policies to assessment of their likely impact on gender. This can be just a box ticking exercise. Mackay and Bilton (2003) suggest that where the development of training and tools has taken place in the absence of more systematic structures they should be seen as ‘preliminary measures’ rather than as evidence of mainstreaming in action. The danger in this kind of scenario is that gender equality policy runs the risk of losing touch with or being devoid of overarching objectives or meaning. In this context, the introduction of gender analysis techniques becomes itself the chief objective of policy. Interestingly, this sets gender mainstreaming adrift of the other approaches to gender which have quite clear objectives. Thus, equal treatment legislation aims primarily at tackling sex discrimination in the workplace (and, recently, to other domains as well) while positive action measures primarily aim at tackling specific problems such as the feminisation of poverty, the lack of political representation of women, the feminisation of the labour market and domestic violence.

There are two possible explanations for the tendency to reduce gender mainstreaming to gender analysis techniques. The first is that the distinctiveness of gender mainstreaming vis-à-vis the other two more traditional approaches is not as clear as it might be. Because gender mainstreaming was introduced as a ‘new’ approach at the same time that the existing approaches to gender equality (equal treatment, positive action) were themselves evolving, the boundaries between gender mainstreaming and those other approaches have become rather fuzzy. A second possible explanation is a general lack of commitment on the part of government and decision makers to gender equality as revealed by the research. Such a lack of commitment facilitates a focus of gender equality policy on policy-making techniques and procedures at the expense of policy objectives that address structural inequalities. Worries about such a shift towards a technical view of gender equality were expressed by interviewees in a number of countries (e.g., Belgium, Ireland). In sum, because gender mainstreaming is on the one hand a portmanteau type of concept which can accommodate different meanings and on the other hand is less clearly defined than other approaches to gender equality, the meaning that is given to gender mainstreaming, as well as the mechanisms used for its implementation, vary quite significantly from country to country.

Against this backdrop of selective utilisation of different components of gender mainstreaming and a transversalism that while it might extend widely is not embedded, there is the danger of a vacuum of both authority and ownership of the approach. That is, the process of horizontalisation may not necessarily put in place a clear hierarchical structure of authority. This then has the effect of diluting and even eliminating ownership. In this context it should be noted that ‘a political process of ownership’ was one of the three key constituents of gender mainstreaming as elaborated by the Council of Europe (1998).

The fact that gender mainstreaming is to be found in each of the countries, albeit varying in degree and meaning, should not be taken to infer that the other approaches to gender equality have been supplanted. Far from it: the evidence for each country is for a mix of approaches.<sup>52</sup> The process of evolution of gender equality policy in Europe in general also involves significant change in equal treatment and positive action as approaches to achieving gender equality. For example, in some countries positive action measures, which were originally targeted on women’s employment and human capital endowments, are now being applied to the private sphere (such as domestic violence in Spain) and more widely in the public sphere beyond education and employment. Positive action measures are in addition being used as a key tool to address structural inequalities (such as institutional bias in recruitment procedures in Belgium). Apart from this, the target of positive action measures has broadened to include measures specifically targeted at men (for example boys’ development programmes in Ireland) or at both women and men (gender stereotyping interventions in France, Greece and Spain).

Equal treatment legislation has also undergone important development. Thus, in many countries such legislation has been reformed to broaden both the concept of discrimination to include indirect discrimination and the sphere of application to include, for example, public services and facilities, aside from education and the workplace. In this sense, the three approaches should be seen as evolving together. The mix of policy is more complex than it was in the past and the distinctions between different approaches are less clear-cut nowadays.

The context within which gender mainstreaming is being implemented is very important, especially in influencing the approach taken to implementing a gender mainstreaming strategy. Thus in countries with a strong positive action tradition gender mainstreaming is emerging mainly through the design of transversal action plans that are essentially positive action in nature (Belgium, France, Spain) while in those countries with a strong equal treatment approach gender mainstreaming is located, at least partly, in the revision of existing equal treatment legislation (Ireland and UK).

In regard to progress and development at EU level, the research reveals some discontent among respondents across countries about the current role played by the EU in gender equality policy and particularly its leadership in this regard. The EU’s role is seen negatively when compared with the important role it played in the development of national gender equality programmes in the past. Respondents point to a decline in the influence both of positive action programmes and EU equality directives. With legislation and positive action seen to be undergoing a decline, EU gender equality policy is perceived to concentrate too much on gender mainstreaming – as for example in the Open Method Of

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<sup>52</sup> However, note that in Lithuania the mix does not include gender mainstreaming.



Coordination (in employment and poverty and social inclusion) and the Structural Funds. This approach is seen to imply a general move away from binding legislation to 'softer methods' which may act as barriers to the advancement of gender equality. In the face of these trends, it could be said that the member states are more innovative in gender equality policy than the EU.

### **5.1.2 Convergence across countries**

There is some evidence of convergence across countries. It is possible for example, to identify a number of common developments in all countries which point towards a slow convergence in the approach taken to gender equality. In particular, there are three components of gender mainstreaming policy that are being extended (to a greater or lesser degree) across all the countries in the study. One is the setting up of dedicated gender mainstreaming units staffed by people with skills to provide technical support as required to various parts of the administration (and in some cases such as Ireland to civil society groups as well). The second common trend is for the introduction of policy evaluation and monitoring mechanisms. Common tools here are gender impact assessment methods and regular reporting mechanisms (to parliament or to government) to monitor progress in gender equality policy across domains. A third element of convergence relates to the way that policy is made and in particular to an increase in social dialogue with the voluntary sector through the institutionalisation of consultation practices, the creation or consolidation of advisory bodies representing women's groups (e.g., women's national councils) and an increase in government investment with a view to equip women's representatives with the necessary skills to participate in policy making.

However, any findings of convergence need to be qualified. The fact that we can identify four models among just eight countries is itself testimony of a high degree of variation. In any case countries, even those which have made similar levels of progress, tend to follow quite different strategies. Furthermore, it should be noted that where there is evidence of convergence it tends to be in the mechanisms of gender equality policy and the institutional set up. Convergence in relation to the understanding of the policy problematic or the objectives of policy is much more difficult to discern. Indeed, both the understanding of the gender equality problematic and the objectives of policy show a significant level of fragmentation, not only across countries but also across different government departments (and policy domains) within countries. For instance, although it is true that countries tend to use a similar line of rhetoric regarding the need to attend to the structural and cultural roots of gender inequalities, in many of them there is a significant gap between rhetoric and practice. Generally speaking, gender stereotyping issues, or issues relating to gendered patterns of power relations, are seldom addressed in practice and, when they are, efforts tend to be fragmented and limited to particular policy domains (such as education).

There are ways in which the convergence that is taking place is being facilitated by the EU, through programmes such as the European Social Fund and the Structural Funds. Funding from programmes such as these has made possible the setting up of a number of gender mainstreaming institutions (e.g., in Andalusia, Spain and Ireland) as well as the introduction of gender impact assessment tools (in Greece and Ireland). The establishment and networking of women's groups has also benefited from EU funding.

### 5.1.3 How to explain progress and developments

In terms of explaining progress, contextual or environmental factors are very important. These include for example, a country's track record and history in addressing gender inequality, the extent to which there are champions of gender within the polity or in the public domain, the extent to which gender mainstreaming 'fits' with the dominant political ethos or the particular set of projects promoted by political actors. In relation to a country's track record on gender, it is not possible to say that the length or duration of a country's engagement with gender inequality is per se a deciding factor. Critical instead is the nature of the approach and the depth of the analysis underlying the approach. In the latter regard what matters is the extent to which there is a structural understanding of gender inequality, i.e., an analysis that is based on an understanding that social structures and value systems in society contribute to the creation and persistence of gender inequality.

Progress in implementing gender mainstreaming is also affected by the existence and activities of 'champions' of gender equality policy. These, sometimes individuals in influential positions, sometimes collective interests or groups, can be key in either turning the political spotlight on gender or keeping it on it. In terms of the third factor – the extent to which gender mainstreaming 'fits' with the prevailing political climate – gender mainstreaming does not necessarily command wide support and yet unless there is a political commitment at very high levels it is unlikely to succeed. There are examples of countries where gender mainstreaming has been embraced by government but has not been realised in policy because of a lacking commitment. In addition, the apparent neutrality of the term 'gender mainstreaming' and its dissociation from feminist politics allows it to be exploited by decision-makers as a catch-all term that fits different purposes (different to gender equality).

One can put such points differently: that the realisation of gender mainstreaming requires a series of conditions to be met. These include, in addition to those mentioned above, expertise in terms of knowledge and skills and the systematic use of evaluation and monitoring tools in policy making and a wide consensus about the objectives of gender equality between all stakeholders (in order to give the process some stability). In some countries, especially France, Greece, Lithuania and Spain, the absence of these conditions is especially striking. They particularly lack stability in the commitment to gender equality and their policy cultures are not sympathetic to activities such as evaluation and impact assessment. The fact that the conditions are not ripe heightens the likelihood that gender mainstreaming will be regarded with a considerable amount of suspicion.

Another potential obstacle to the advancement of gender equality is a current policy trend in some countries (especially Ireland and the UK, with some elements also detected in Lithuania and Sweden) towards the inclusion of gender equality policy under a more generic equality rubric, i.e., a policy where other concerns such as age, disability, race, religious belief or sexual orientation are integrated alongside gender. Although it is too early to assess the impact of this trend on gender equality, or whether it is going to be extended to other countries, some respondents were of the view that gender risks being rendered invisible by this development. Given the high profile accorded to issues such as immigration and ethnic minorities or disability, generic equality policy tends to prioritise such issues (e.g., disability concerns in Irish education policy; race in British equality policy in general) at the expense of gender equality. This trend towards broadening the

equality framework is also visible at EU level (for example in the Commission's 2004 Green Paper on equality and non-discrimination).

Another possible obstacle is a shift of gender equality policy (including gender mainstreaming) to more closely serve economic and especially labour market and productivity objectives. This is visible at both EU and member state level. Although arguably not new, an increased emphasis on labour market objectives is marked in France, Greece and the UK. This is to be seen in the objectives and content of policy (for example, gender equality initiatives in education policy in the UK) as well as in the naming of gender equality institutions (for example, renaming of Minister in charge of equality affairs in France). However, while in France and the UK this renewed focus on labour market and productivity issues is tied to national economic priorities, in Greece it is tied to the dependency that its gender equality policy has on EU Structural Fund Programming (which has a strong labour market orientation).

#### **5.1.4 Gender mainstreaming as a bureaucratic or political tool**

One of the key questions on which the literature on gender mainstreaming is divided pertains to whether gender mainstreaming is a bureaucratic tool (in the sense of a procedure for policy making that is carried out by experts) or a political approach (in the sense of drawing upon a particular commitment to and view of democracy)? Our research suggests that in general gender mainstreaming in Europe today is procedural in the sense of being a technique and practice employed by policy making elites rather than a strategy for and project of structural change and empowerment. Gender mainstreaming is primarily a way of making the bureaucracy and policy making more efficient.

To some extent the underlying question is how radical gender mainstreaming is or can be. To what extent is it transformative (a strategy oriented to the achievement of particular structural goals) rather than simply a method or procedure? In terms of existing work Rees (1998) and Booth and Bennett (2002) suggest that it is transformative whereas Verloo (2001) and others are more sceptical.<sup>53</sup> The results of this research would tend to support the sceptical view – if one understands transformation as having a structural connotation there is little if any identifiable change of a structural nature. At best it is a strategy or approach to delivery. We also agree with Verloo and others that while potentially gender mainstreaming is very powerful it is certainly not an unproblematic approach.

What the research has revealed is a process of horizontalism or transversality which involves gender being extended across a range of policy domains and sometimes institutions – a key aim being to incorporate gender into a range of governmental institutions and policies. What is happening is that there is breadth but not depth. Depth implies embeddedness of gender mainstreaming practices, in particular in leading to or being implemented through structural change. Essentially, to paraphrase Walby (2004), what is at issue is the relationship between gender mainstreaming and the mainstream. Under current arrangements the mainstream remains more or less as it was. There is still a long way to go.

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<sup>53</sup> Rees, T. (1998) *Mainstreaming Equality in the European Union, Education, training and labour market policies*, London: Routledge; Booth, C. and Bennett, C. (2002) 'Gender mainstreaming in the European Union: Towards a new conception and practice of equal opportunities?', *The European Journal of Women's Studies*, 9: 4, pp.430-446, Verloo, M. (2001) *Another Velvet Revolution? Gender mainstreaming and the politics of implementation*, Vienna: IWM Working Paper no 5.

## 5.2 POLICY CONCLUSIONS

### Progress and weaknesses of gender equality policy

Progress has been achieved over recent years, particularly in establishing important mechanisms for the design and implementation of gender equality policy at European and national levels (see Annex 3 for examples of innovative practice). These include legal and institutional mechanisms, as well as mechanisms for shaping policy-making so that gender issues are taken into account. Progress can be identified across the EU, both in new Member States (particularly as a result of the *acquis communautaire*) and in ‘older’ Member States, including countries that have strong and weak traditions of addressing gender equality.

It is much more difficult, however, to identify progress in terms of the outcomes of gender equality policy; this relates partly to the absence of clear objectives and of monitoring and evaluation (discussed below) and partly to the fact that it may be too soon to judge the effectiveness of recent policy approaches, such as gender mainstreaming, which aim to effect structural change. The research suggests that gender mainstreaming is being treated largely as a procedure or technique, and not as a strategy for achieving structural change and empowerment.

EQUAPOL has revealed a process of horizontalism or transversability that involves gender being extended across a range of policy domains and sometimes institutions. However, there is breadth not depth. Under current arrangements the mainstream remains more or less as it was. There is no evidence as yet of the transformative potential of gender mainstreaming.

Moreover, in the current political and policy environment, which is widely considered to be negative for gender equality, particularly at European level, the potential of gender mainstreaming to produce ‘gender-sensitive’ and ‘women-friendly’ public policy is limited. This does not mean that progress cannot be made, but that new approaches are needed, both to secure the gains already achieved and to make further progress.

### Vision and objectives of gender equality

One of the main policy conclusions is the need for a much clearer vision of the objectives of gender equality. One of the identified weaknesses of current approaches, most notably gender mainstreaming, is the focus on process at the expense of outcomes. While quantitative objectives have been elaborated (for example the gender indicators agreed under various Presidencies), particularly relating to employment, there is a near total absence of clear social goals and objectives relating to gender equality, even in countries such as Sweden where the principle of gender equality is strongly accepted in society and policy. This makes it difficult to win support for gender equality (what are the benefits, and for whom?) and to elaborate qualitative and quantitative indicators to measure achievements beyond specific policy areas or sectors.

### Gender equality within a broader equality approach

Concerning how to progress gender equality within the context of a broader equality approach, some policy conclusions can be drawn. Gender experts and feminists agree

about the specificities of gender, and that gender inequality is about particular types of power (patriarchy), rendering it different from discrimination on the basis of ethnicity or disability. This means that specific gender equality mechanisms (legal, institutional) and procedures (for dialogue, analysis and policy design) must be maintained, as well as positive actions to empower women and promote gender equality. Targeted resources, expertise in gender and gender-specific knowledge and information are also required. However, this can be achieved within a broader institutional framework, which addresses various forms of equality and discrimination. Indeed, there may be advantages – as examples from Scotland and Northern Ireland suggest – in terms of increased political support and resources, and the ability to build alliances across different “identity intersections” (gender and ethnicity, gender and age). Gender equality must not, however, be absorbed into a broad equality approach so that it becomes invisible and stripped of resources, and must not be treated as merely an issue of ‘discrimination’. The issue is not so much if gender equality can or should be addressed within a broader equality approach, but how this can be done so that gender equality is adequately treated.

#### Gender mainstreaming: more robust implementation

Concerning gender mainstreaming, the policy conclusions are clear. Gender mainstreaming has many strengths: it addresses structural change and gender relations (not just women and men); it challenges the neutrality of policy and has developed methods and procedures for assessing and amending policies; it implies a consistent, continuous process across all policy domains; and it engages a broad range of actors in its implementation. However, structural change takes time and more robust efforts are needed to strengthen the implementation of gender mainstreaming in policy. Firstly, establishing strategic priorities and focusing efforts on priority areas is essential. This means identifying strategic ‘entry points’ for gender - within a policy domain and policy cycle - that have the greatest chances to progress gender equality. Going ‘mainstream’ is also vital; there should no longer be only pilot projects and “stand-alone, short-term” initiatives. More systematic use of gender analysis and gender budgeting in the context of mainstream budgetary processes and policy reviews could bring significant benefits.

#### Broader stakeholder participation and stronger alliances

One of the clear policy conclusions is that gender equality policy and gender mainstreaming cannot be left to policy-makers alone, and not to male-dominated policy-making structures. To progress gender equality, a much wider range of stakeholders needs to be involved in policy dialogue and policy-making, and many more women. This means establishing structured mechanisms for engaging stakeholders outside the state and parliament in policy dialogue, and promoting two-way mechanisms of dialogue not merely one-way consultation. Parliamentary and Government committees on gender equality can include stakeholders from civil society and the private sector. And it means making much more rapid progress on implementing commitments to the equal participation of women and men in decision-making.

More participatory methods of gender analysis and policy development should be used, involving women’s organizations, gender experts and researchers. Stronger alliances are needed, across the political spectrum and across different types of stakeholder (civil society, private sector, research, government, parliament). In this way, the knowledge-base



of policy assessment and formulation can be improved, and links can be better made between public policy and other spheres of action on gender equality.

#### Strengthening the knowledge-base on gender

A strong conclusion for the development of gender equality policy is the need to reinforce knowledge about gender and gender inequality, and about the impact of public policies on gender relations and gender equality. This means much more systematic monitoring and evaluation paying attention to gender aspects, supported by data and information. Qualitative research, especially on how gender inequality is maintained and on the intersections between gender and other identities and discriminations, is also needed to support policy-making. Even in the Nordic countries, where there has been considerable investment in gender research, there is a need for more research and information, particularly related to important policy areas. Stronger and more sustained support for gender studies in universities and continued European funding of gender, and gendered, research are needed.



## **Annex 1**

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## Annex 2

### List of deliverables

<i>Deliverable titles</i>
Literature Review Report
Policy Review Report
Report on research design and methodology
National Reports
Comparative Policy Analysis Report
Report of European conference
Report of national thematic seminars
Policy briefings
Final report
Dissemination report
Executive Summary in 6 languages



## Annex 3

### Examples of innovative practice from the case study countries

#### GENDER BUDGETING

##### **France: Financial Efforts to Promote Equality: The “yellow book” as an Annex to the Finance Bill**

Legislation now means that as an annex to the Finance Bill, the government must present financial efforts allocated to promote equality between women and men. Known as the “yellow book”, the first was produced in November 2000. It mainly presents the amount of funding for actions specifically targeted at women. At the moment, the “yellow book” budgets do not include the funding allocated to gender equality by every government department.

The budgetary reform scheduled for 2006 should mean that a budgetary policy for the Department for Women’s Rights can be established as well as a lateral budgetary policy for the means allocated to promoting equality throughout the various ministries. From 2006, it is intended that the allocation of budgets to the various departments will be conducted in the form of a programme and justification will have to be produced for all funds allocated.

##### **Basque Region, Spain: Mainstreaming Gender in the Budgets of all Departments within the Regional Administration**

The Gender Budget initiative in the Basque Region was conceived in 1999 by Emakunde, the Women’s Institute of the Basque Region, to mainstream a gender perspective into the budget of departments within the administration. The initiative, part of the Third Plan of Affirmative Action for Basque Women, started with several projects aimed at training relevant officials in the gender analysis of budgets. Initial actions included:

- Elaboration of a detailed digital library on gender budgeting with open access through the internet;
- Setting up of a seminar at the Basque Government Interdepartmental Committee;
- A follow up seminar held at Emakunde with leading experts in the field.

In 2001 a pilot project on gender budgeting was set up within the Basque administration. This was carried out by a working group involving several departments and assisted by a leading expert from Scotland. The pilot project involved six Basque government departments, including: the Home Office; Industry, Trade and Tourism; Transport, Public Buildings and Infrastructure; Health System; Culture; and Land and Environment. The pilot project ended in 2002 with a closing conference with contributions by national and international experts.

### **United Kingdom: Gender Analysis of Expenditure Project (GAP): Pilot Project in Two Departments**

The Gender Analysis of Expenditure Project (GAP) was launched in Spring 2003 on a pilot basis to be run for six months. It was managed by the HM Treasury and supported by both the HM Treasury and the Women and Equality Unit at the Department of Trade and Industry. A Women's Budget Group provided technical support and management assistance.

The project examined two programmes in two departments, using a gender analysis of budgets approach. The participating departments were the Department for Work and Pensions and the Department of Trade and Industry.

The objectives of the project were to:

- Test gender analysis tools across a range of programmes;
- Identify the value-added of gender analysis of expenditure;
- Strengthen the capacity of each department to incorporate a gender analysis in their expenditure planning and policy making;
- Contribute to broader gender equality objectives.

The cross-departmental initiative served to raise awareness about the relevance of gender in the everyday work of different government departments and to promote greater expertise in the use of mainstreaming tools. Among the conclusions of the pilot project were that gender analysis can contribute to enhancing the evidence base that is used to inform policy development, implementation and evaluation, but there is need to involve and obtain the support of key stakeholders across government and to significantly improve sex disaggregated data.

## **INSTITUTIONAL SET-UP**

### **Spain: Gender Mainstreaming Unit in the Andalusian Administration**

The Gender Mainstreaming Unit at the heart of the Andalusian executive is a support unit, jointly run by the Department of Finance and the Andalusian Women's Institute, whose role is to assist all the different departments in the executive in integrating a gender perspective into their policies and programmes.

The Unit was created by the Andalusian Women's Institute in 2003 with the aim of providing the administration with a stable support structure to implement and consolidate gender mainstreaming in the region. It is partly financed by the European Social Fund and its brief is oriented towards the measures and actions supported under the 2000-2006 Operational Programme, co-financed by the European Structural Funds.

The Unit organises training for the programme management teams on the 'integrated gender approach' and provides specialised advice on the integration of a gender perspective in the management of the programmes.

The Gender Mainstreaming Unit targets staff responsible for planning public policies and civil servants at all levels of the Andalusian administration. Its primary target is all staff involved in planning and managing the measures in the Operational Programme 2000-2006. It also targets all those interested in applying or enhancing the 'integrated gender approach' in their professional practice.

### **Ireland: NDP Gender Equality Unit**

The NDP Gender Equality Unit was set up to advise policy makers on how to incorporate a gender equality perspective into the development, implementation and evaluation of the National Development Plan 2000-2006 (NDP), which is the umbrella framework for programmes co-financed by the European Structural Funds. The NDP supports health services, social housing, education, roads, public transport, rural development, industry, water and waste services, childcare and local development.

The Unit has five staff, and funding of €5.36 million over the period 2000 to 2006.

The Unit's work includes:

- monitoring NDP commitments on gender equality
- providing advice, training and information on issues relating to gender mainstreaming in the NDP
- Collecting and analysing data, and advising on and developing appropriate indicators, to support gender mainstreaming
- Advising on the gender impact assessment of policy proposals
- Supporting participation by community and voluntary groups in the gender mainstreaming process.

Since 2000, training and briefing events have been organised, reaching over 700 NDP policy makers, who have been trained on gender equality issues, as well as senior officials in government departments and social partner groups. A Gender Proofing Handbook has been produced, and a data base of sex disaggregated statistics has been compiled. Surveys and research work have been carried out on gender equality issues in various policy areas (transport, tourism, urban development, research and development, etc), and in 2003 a report on gender equality in the social welfare system was published.

## CONSULTATION AND PARTICIPATION

### **United Kingdom: Scottish Women's Convention**

The Scottish Women's Convention, established by the Scottish Executive in partnership with women's organisations in December 2003, is a mechanism for engagement between women's organisations and policy makers in Scotland. Its main role is to enable women's organisations in Scotland to discuss policy-related issues, engage with the Scottish Parliament and Executive and influence policy decisions. The Convention is an independent body, with a small team of staff (the equivalent of two full-time workers) and is led by a Steering Group comprising representatives from 18 Scotland-wide women's organisations. It is financed by the Scottish Executive.

The aim of the Women's Convention is to take forward, in a more strategic way, the work done previously by the Women in Scotland Consultative Forum, which was established in 1998 to provide a framework for continued close contact and consultation between the Scottish Executive and women in Scotland following devolution. One of the main achievements of the Forum was to involve a broad range of women's organisations across Scotland, a number of which had not previously had active engagement with political or governmental processes.

To date the Women's Convention has organised two short-term policy groups to respond to Scottish Executive consultations on transport and hate crimes, and it has an on-going policy group on women and health policy. The members of policy groups are drawn from national and local specialist organisations, as well as individuals with particular expertise.

### Sweden: 3R or 4R Method

The **3R-method** was developed by Gertrud Åström and the Swedish Association of Local Authorities, and has primarily been used by local authorities to review and analyse local government policies and activities from a gender perspective. The method involves developing quantitative data, figures and information, which then provide the basis for a qualitative analysis of the policy or activity under examination. It also helps to systematically compile facts and information about the situations of women and men in a given domain.

The first 'R' stands for Representation and has to do with how many women and men there are at different levels in the organisation or domain and among citizens and users of the goods or services provided.

The second 'R' stands for Resources and deals with how the organisation's or policy's resources are distributed between women and men.

The third 'R' stands for *Realia* and has to do with why representation and resource distribution are divided between the sexes the way they are. The answer provides an idea of the normative ways in which women and men are viewed in the domain, organisation and in wider society, and how this affects the policy or action.

Later a fourth 'R' has been added, which stands for Restrictions, by which is meant the various kinds of limitations, such as distribution of resources or access to data. Budget and cost restrictions, or laws and regulations, could be among the restrictions.

## **Examples of innovative practice from other countries for benchmarking purposes**

### **Canada: Gender-based Analysis (GBA)**

Gender-based Analysis (GBA) is a central element of Canada's approach to gender equality in public policies and programmes, and is at the core of the work of Status of Women Canada (SWC). GBA requires collection of sex-disaggregated information about the participation of women and men in a particular policy, activity or programme, and analysis based around various key questions, for example concerning its objectives in terms of women's and men's well-being, women's and men's access to the resources and benefits connected with the policy or programme, the level and quality of women's and men's participation, control of decision-making processes and resources, and any negative impacts on women or on men.

SWC provides tools, training materials and procedures to other federal departments and agencies to set up their own gender-based analysis processes. Individual departments and agencies are responsible for determining which legislation or policies have the potential to affect women and men differentially and, thus, are appropriate for an application of the gender-based analysis.

Efforts by SWC have focused primarily on the development of instruments and capacity to undertake gender-based analysis. In 1997 a Gender-based Analysis Guide, presenting the steps to incorporate gender considerations into policy development and analysis, was published. In 1999 a Gender-based Directorate within SWC was established, which assists in the design of customised training programmes, carries out information dissemination and educational activities and provides technical assistance, through partnerships and pilot projects, to federal departments and other organisations. An Interdepartmental Committee on Gender-based Analysis provides a forum and informal network for exchanges between federal departments on GBA. In 2000 and 2002 it organised "GBA Resource Fairs" for federal public servants with an interest in GBA to share information and experiences and build knowledge of the use of GBA by government departments. Examples of activities organised by SWC to promote the use of GBA include: the organisation of an on-line discussion on GBA in 2001-2002, to promote a common understanding of GBA amongst women's organisations; production of an information kit on GBA<sup>54</sup>; and provision of specialised "train the trainer" GBA training in 2003.

There has yet to be a formal evaluation of the Federal Plan, or of the use of gender-based analysis<sup>55</sup>.

<sup>54</sup> An Integrated Approach to Gender-based Analysis, January 2003 – see [http://www.swc-cfc.gc.ca/pubs/gbainfokit/gbainfokit\\_pdf\\_e.html](http://www.swc-cfc.gc.ca/pubs/gbainfokit/gbainfokit_pdf_e.html)

<sup>55</sup> Pers.comm. Suzanne Cooper, Information and Research Analyst, SWC, who notes, as one explanation of the absence of any evaluation to date, that "there is a gap in the availability of impact assessment tools that focus on gender-based analysis".



### **Netherlands: Gender Impact Assessment**

In 1992 the Department for the Co-ordination of Equality Policy of the Dutch government commissioned the design of an instrument for Gender Impact Assessment (GIA) of government policies. The GIA aimed to analyse ex-ante the potential effects of new government policies on gender relations in Dutch society. Two Dutch researchers, Conny Roggeband and Mieke Verloo, were involved in the development of the instrument and in its testing in pilot studies.

The GIA proposed five steps:

1. Description of current gender relations, including sex differences in the division of labour, in relation to personal relationships and sexuality (the organisation of “intimacy”) and in the distribution of resources;
2. Description of the likely development without the new policy;
3. Description and analysis of the new policy plan
4. Description of the potential effects on gender relations
5. Evaluation of the positive and negative potential effects on gender relations.

The first GIA was applied to the proposed reorganisation of junior secondary and pre-vocational education in 1994, leading to modifications of the original proposal. Between 1994 and 2004, 20 GIAs have been completed at national level, in the fields of education, justice, tax policy, urban planning, social security and agriculture. The GIAs undertaken differ greatly in their comprehensiveness and depth of analysis. Some, but not all, use the original instrument. In others, some core elements of the instrument – most notably the analysis of the “organisation of intimacy” – have been eliminated, reducing the gender analysis to the less contentious gendered division of labour. Moreover, the number of GIAs conducted is very limited compared to the hundreds of policy plans developed every year.

### **New Zealand: Gender Implications Statement**

In March 2002 a Cabinet Office Circular agreed that a “gender implications statement” (GIS) will be required for all papers submitted to the Cabinet Social Equity Committee. This followed on from earlier initiatives by the Ministry of Women’s Affairs to promote the use of gender analysis, but which – due to the informal approach pursued – were not effectively integrating gender analysis and advice into public policy.

The purpose of the GIS is “to ensure that policy proposals include an assessment of the impact of the proposed and existing policies and programmes on women and men, and whether they advantage or disadvantage women and men”. The GIS reports succinctly on whether gender analysis has been undertaken and if it has not, why not (e.g. no data or no gender expertise available), and may also include a summary of the findings of the analysis.

The gender analysis tool includes a number of issues to analyse and identify, including:

- How and to what extent the policy proposal will affect women and men
- What the desired outcomes for women in the policy area are, and if they are same/different for men
- Options to address the issues
- International and national legal obligations
- Informing women and men about the policy change and establishing a monitoring system.

The impacts on Maori and Pacific women and men should be paid attention to in the analysis.

The Ministry of Women’s Affairs provides advice, guidance, seminars and presentations on how to integrate gender analysis in policy development, but the public service departments are responsible for incorporating gender analysis into their policy development.

Its 2002 Circular the Cabinet Office noted that the quality of statements to date had been very variable, because gender analysis had not been applied at the problem definition stage of policy development.

### **Action Plan for New Zealand Women**

In December 2002, the Ministry of Women's Affairs published a discussion document, "Towards an Action Plan for New Zealand Women", which included the government's goals, policy principles and specific issues affecting Maori women. A national consultation process was launched to gather women's views for inputs into the Plan. The consultation process included:

- 20 formal consultation meetings held by the Ministry of Women's Affairs in partnership with the National Council of Women of New Zealand, the Maori Women's Welfare League and other bodies
- 10 meetings between Ministry officials and specific interest groups
- 6 focus group meetings with representatives of target groups of women
- 267 public submissions in response to the discussion document.

The Action Plan for New Zealand Women, published in 2004, aims to improve outcomes for women in three areas:

- Economic Sustainability, to improve women's economic independence and ability to contribute to the New Zealand economy and to ensure access to a good level income and the skills and knowledge they will help women maximise their financial resources
- Work-Life Balance, to help women achieve a greater balance between paid work and life outside work
- Well-Being, to improve health and social outcomes for women.

For each area, the Plan presents: the actions to be taken, the lead agencies responsible for the actions, and the milestones to be achieved. An outline Monitoring Framework, including core indicators, is annexed to the Plan, to be further developed by the Ministry of Women's Affairs.

## **Annex 4**

### **Policy briefings**

The EQUAPOL project, supported by the EC's 5<sup>th</sup> Framework Programme (DG Research), assessed the progress and impact of integrating gender into public policy in Europe. It focused particularly on social policies prioritised by the European Social Policy Agenda. Policies, and policy structures and processes, in eight countries and at European level were studied between 2002 and 2004. The five-partner research team was led by the Department of Social Policy at Panteion University in Athens. More information is available at [www.equapol.gr](http://www.equapol.gr)

Emerging from the EQUAPOL findings are a number of conclusions and recommendations for national and EU policy on gender equality, which are summarised in a series of policy briefings.

#### **Policy briefing 1: Gender mainstreaming as a strategy for promoting gender equality**

##### **Research findings:**

- Progress in implementing a gender mainstreaming approach has been slow and uneven across the EU.
- Some countries have made important progress in introducing gender mainstreaming in public policy, with Sweden in the vanguard. In other countries, gender mainstreaming efforts are highly fragmented, confined to particular policy programmes or domains and often short-lived in duration. Countries with fragmented gender mainstreaming practices are those where a coherent and elaborated governmental policy on gender equality is either missing (as in the UK) or do not follow the principles of gender mainstreaming (as in Spain).
- A “transversalist” approach is evident in many countries (e.g. Belgium, France, some Spanish regions), whereby gender is added on as an additional objective or consideration, albeit across a range of policies.
- There is little evidence as yet of any systematic integration of a gender equality perspective into mainstream policy processes, or of policy outcomes that are more “gender-sensitive” or “women-friendly”.
- There has been much innovation in developing tools and methods to support the integration of gender in policy-making, encouraged in part by EU and international developments. However, pilot projects abound, and the focus has mainly been on policy analysis, leaving mainstream policy-making processes and decision-making largely untouched.
- There is evidence of a convergence of approaches across countries, mainly in the mechanisms and institutional set-ups. Convergence in relation to understanding of the policy problematic and objectives is more difficult to discern.
- Importantly, gender mainstreaming has not replaced previous approaches to gender equality, and legislation and positive action remain important tools to progress gender equality. Indeed, there is a strong defence of the importance of these tools by gender policy actors in many countries.

- Key factors in explaining progress are the extent to which there is a broad-based, structural understanding of gender inequality and the existence and activities of “champions” of gender equality policy, both individuals and collective groups.
- With very few exceptions, there is a general lack of commitment on the part of governments and decision-makers to mainstreaming gender in policy-making. Rhetorical support for gender mainstreaming has not yet been followed through with the resources and measures that are required to establish and sustain gender mainstreaming across the policy spectrum.

#### **Policy conclusions:**

- ✓ A much clearer vision of the objectives of gender equality is required, especially concerning social (rather than purely employment) goals and outcomes.
- ✓ Winning broad-based support for gender equality requires much better understanding and communication of the benefits of gender equality, for different groups and for society as a whole. Clearer connections need to be made between gender equality and other policy priorities, such as social integration or economic growth.
- ✓ Gender mainstreaming must not be abandoned, but more robust efforts are needed to strengthen its implementation. Going “mainstream” is vital; there should no longer be only pilot projects and “stand-alone, short-term” initiatives.
- ✓ Establishing strategic priorities and focusing efforts on priority areas are essential. This means identifying strategic “entry points” for gender that have the greatest chance to progress gender equality, rather than spreading efforts too thinly or in areas that have little importance for real improvements in gender equality.
- ✓ More systematic use should be made of gender analysis and gender budgeting in the context of mainstream budgetary processes and policy reviews.
- ✓ More systematic monitoring and evaluation of the gender aspects of public policy is needed, supported by data and information. Qualitative research, especially on how gender inequalities are maintained and on the intersections between gender and other identities, are needed to support policy-making.

#### **Policy briefing 2: Governance and gender equality**

##### **Research findings:**

- Progress in implementing gender equality policy and gender mainstreaming has been advanced by the actions of, and alliances between, individual women in power, civil society organisations and gender experts, but hindered by inadequate institutional structures and mechanisms.
- Progress has often been made as a result of alliances between – and the actions of – individual women in positions of power as well as civil society organisations and gender experts. Where government commitment on gender equality is weak, these coalitions and alliances play a vital role.
- While all countries have a specific government department or unit responsible for gender equality policy, these structures do not have sanctioning powers and cannot oblige any other department of the administration to implement gender equality policy.
- The attachment of gender equality to a central ministry is rare (Sweden); more generally gender equality institutions are located at the periphery. Their generally low status and level in the ministerial and institutional hierarchy further reduces their ability to influence other departments to follow through on commitments to gender mainstreaming.

- Gender equality institutions with sanctioning powers exist in some but not all countries, but these are responsible for the enforcement of equality legislation, and have no powers in the area of gender mainstreaming in public policy.
- Gender support units or research bodies provide important supporting functions to gender mainstreaming policy making in some countries.
- A high level of government ownership of gender equality policy in Sweden is one factor in explaining gender mainstreaming progress at national level – but may also be a weakness in implementing gender mainstreaming beyond the domain of national policy and at local level.

#### **Policy conclusions:**

- ✓ Centrally-located, high-level structures with robust remits to promote the implementation of gender equality across the policy spectrum are required, backed up by mechanisms to monitor and ensure implementation of gender mainstreaming commitments.
- ✓ Well-resourced support units attached to these structures are vital, to provide essential knowledge and expertise in gender policy analysis, information and data.
- ✓ Progress in gender equality policy and gender mainstreaming requires the involvement of a much wider range of stakeholders in policy dialogue and policy-making. Structured mechanisms for engaging stakeholders - from both inside and outside the state and parliament – in policy dialogue are essential. Parliament and Government committees on gender equality should involve stakeholders from civil society and the private sector.
- ✓ Much more rapid progress on implementing commitments to the equal participation of women and men in decision-making is vital.
- ✓ Dialogue must be two-way, not merely one-way consultation. More participatory methods of gender analysis and policy development should be used, involving women's organisations, gender experts and researchers.
- ✓ Stronger alliances are needed, across the political spectrum and across different types of stakeholder (civil society, private sector, research, government, parliament). In this way, the knowledge-base required for gender-aware policy assessment and formulation can be strengthened, and links can be better made between public policy and other actions on gender equality.

#### **Policy briefing 3: Addressing gender equality within a broader equality approach**

##### **Research findings:**

- Although most strongly evident in the UK (especially in Scotland, Wales and Northern Ireland), a number of countries are moving towards the development of gender mainstreaming as part of a broader approach to equality in public policy. This is particularly evident in countries, such as Ireland and the UK, with a strong equal treatment approach and where the revision of existing equal treatment legislation has created a space for new reflections on equality policy and structures. The shift is evident too at EU level.
- A generic approach to equality is regarded by many gender actors as a potential risk and obstacle to the advancement of gender equality, because it may make it more difficult to highlight and address the specificities of gender inequality, and may sideline gender equality compared to other forms of inequality and discrimination with a higher



profile (ethnicity, disability). Gender inequality is about particular types of power (patriarchy), rendering it different from discrimination on the basis of ethnicity or disability.

- Some experiences suggest, however, that it may be possible to advance gender equality in policy within a generic approach. In Scotland, for example, the Equality Strategy adopts a mainstreaming approach and aims to tackle discrimination on a range of grounds, one of which is gender. The Strategy is implemented in partnership with a wide range of actors, and addresses the specificities of gender through a specific gender equality unit.

#### **Policy conclusions:**

- ✓ Embedding gender equality policy and implementation within a broader approach to equality may have significant benefits, making it possible to better address multiple discrimination and identities and increasing the political support and resources to tackle inequalities. Moreover, it may be easier to build alliances across different “identity intersections” (e.g. race and gender, gender and age).
- ✓ However, gender equality must not be absorbed into a broad equality approach so that it becomes invisible and stripped of resources, and must not be treated as merely an issue of “discrimination”.
- ✓ Specific gender equality mechanisms (legal, institutional) and procedures (for dialogue, analysis and policy design) must be maintained, as well as positive actions to empower women and promote gender equality.
- ✓ Targeted resources, expertise in gender and gender-specific knowledge and information are also required.

#### **Policy briefing 4: European support for gender mainstreaming**

##### **Research findings:**

- In general terms, EU gender equality policy has supported gender equality policy developments at national level, and has given gender mainstreaming efforts legitimacy and credibility. In some countries, the EU has been a driving force in efforts to integrate gender into government policy.
- EU gender equality legislation has had a particularly important influence at national level, both in more advanced countries and in the new member states. However, actors in Lithuania, for instance, feel that EU directives are leading to an overemphasis on economic considerations at the expense of much needed attention to other areas that are of great concern to women. More generally, gender actors across the EU observe both a softening in the use of legislation and a trend towards a less progressive EU equality agenda.
- Financial support for positive action and gender equality measures, particularly by the European Structural Funds, has been a particularly strong influence on national policy development and programmes in many countries and in certain policy domains.
- Many actors involved closely in gender equality policy at national and EU levels express considerable “disappointment” and “discontent” about the recent direction and pace of EU gender equality policy.
- Support for positive action at EU level is observed to have waned, and some leading gender experts argue that gender mainstreaming has been associated with a curtailment in the use of positive action as an instrument of gender equality policy.

- In some policy domains, the influence of EU policy is considered weak, and in some case negative (e.g. social security and pensions policy in Greece and Lithuania).
- Concerning the future, there is pessimism about the future role of the EU in leading on gender equality policy. In the words of one respondent in Spain: “the EU has stopped functioning as a reference for gender equality”. There is a noted decrease in the ability of the European Commission to negotiate policy at European level, and to provide informed insight on gender equality issues and policy.

**Policy conclusions:**

- ✓ Much stronger implementation of commitments to gender equality policy and gender mainstreaming at EU level are needed, to sustain previous efforts and to regain the EU’s status and influence.
- ✓ Equality legislation and positive action continue to be important instruments in advancing gender equality and require stronger support at EU level.
- ✓ The European Gender Institute provides an important opportunity to strengthen the knowledge-base and to support networks and alliances in support of gender equality policy at all levels (EU, national, regional, sectoral). However, this must not replace the European Commission’s important role in leading and coordinating on gender equality policy and gender mainstreaming across the spectrum of EU policy, and in monitoring and enforcing gender equality legislation.
- ✓ Changes in how policy is shaped and implemented in the European Union (particularly the use of the Open Method of Coordination) and the general shift to “softer” laws means that new approaches are needed to advancing gender equality policy and the integration of gender across the policy spectrum. The Open Method of Coordination, and use of targets and indicators, could help to reinvigorate gender equality policy, and involve a wide range of stakeholders in policy dialogue and development.
- ✓ Stronger and more sustained support for gender studies in universities and continued European funding of gender, and gendered, research are needed.



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