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Gender - sensitive and women friendly public policies:
a comparative analysis of their progress and impact

Deliverable 1:	State of the Art Report
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Project coordinator:	KEKMOKOP, Panteion University, Athens, Greece
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Partners:	School of Sociology and Social Policy, Queen's University, Belfast, U.K. DULBEA -Université Libre de Bruxelles, Brussels, Belgium Luleå University of Technology, Luleå, Sweden LAW UNIVERSITY OF LITHUANIA, VILNIUS, LITHUANIA
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EXECUTIVE SUMMARY

Dr Mary Braithwaite,
KEKMOKOP, Panteion University

ABSTRACT

The State of the Art Report (Deliverable 1) of the EQUAPOL research study assesses the current state of knowledge of policies on gender equality and of the treatment of gender within public policies on income distribution and education. It covers both international and European policy developments, as well as national developments in the eight study countries (Belgium, France, Greece, Ireland, Lithuania, Spain, Sweden and the UK). The frameworks on gender equality in public policy - both generally and in income distribution and education policies in the study countries - are assessed through the available literature, as well as the institutional architecture, policy-making processes, methods and tools, the role of non-state actors and the main influences on change.

The State of the Art Report shows clearly that the treatment of gender equality within public policy is a “work in progress”. While specific initiatives on equal rights for women and men have a longer history, the introduction of a more coherent and systematic approach to gender equality in public policy is relatively recent. National trajectories and strategies concerning gender equality differ in time and character until the mid 1990s, when the promotion of a gender mainstreaming approach by EU and international organisations influences the adoption of similar approaches and instruments in most of the study countries.

The State of the Art Report demonstrates both the common features of recent developments at international, EU, national and in some cases regional levels, and also conceptual and methodological differences in the treatment of gender equality in public policy. There are variations between countries (as well as within some countries, where the regional level plays a key role in public policy), and between policy domains. The interaction between gender equality and other policy objectives (especially on employment, economic growth and the family) is notable at all levels of decision-making. Some of the key influences – institutional, organisational, political, social and cultural – on the development of gender equality, both positive and negative, are highlighted in the Report. The importance of informal as well as formal barriers to progress on gender equality is especially noted.

1. INTERNATIONAL AND EUROPEAN POLICY CONTEXT

1.1 Policies on gender equality

The complex interplay between international, European Union and national policies on gender equality has been the subject of recent research, both European and international. EU policy on gender equality has a long history, with the early introduction of legislation on equal treatment, followed by the later adoption of equal opportunities legislation and positive actions, to remedy the limitations of a purely equal treatment approach. Influenced by international – especially UN – developments, gender mainstreaming was introduced as the main EU policy approach from the mid 1990s onwards.

While national trajectories concerning gender equality policy may have differed markedly during the 1970s and 1980s, since the mid 1990s increasing convergence of approach between countries can be identified, with the widespread adoption of gender mainstreaming and greater harmonisation of national and European policies. The influence of international policy developments on European approaches is also visible from the mid 1990s onwards, with clear borrowing from international – especially UN and OECD - work on gender mainstreaming.

Gender mainstreaming is a radical concept, entailing – at least in theory – the “re-organisation, improvement, development and evaluation of policy processes so that a gender equality perspective is incorporated in all policies at all levels and at all stages, by the actors

normally involved in policy making” (Council of Europe definition). The EC’s definition is no less radical in intent, requiring the mobilisation of all general policies and measures specifically for the purpose of achieving gender equality. With this commitment comes a package of measures – including sex-disaggregated and gender-sensitive data, awareness-raising and training, institutional mechanisms and tools for policy evaluation – to support the implementation of gender mainstreaming.

While the introduction of gender mainstreaming arises in part from critical assessments of the limitations of previous approaches to gender equality (equal treatment, positive actions), and from feminist critiques of liberal democracy and policy-making processes (the use of universal categories, the assumptions of gender-neutrality), gender mainstreaming has also received considerable critical assessment. Although some researchers argue that it has the potential to address, in a more holistic and systemic way, the structural causes of gender inequality, some analysts have argued that its transformative power is limited by the emphasis on individual rights and a neo-liberal economic rationale. Its rapid acceptance may be explained by its resonance with the dominant policy frames of the EU institutions (and member states), which endorse state intervention in pursuit of social goals such as gender equality only inasmuch as they support other – more important – goals, such as economic competitiveness and growth.

How gender mainstreaming is translated in practice will reveal much about its real objectives. If it is treated as a more or less technical process, for example focusing largely on data collection, gender proofing and monitoring, the political character of the gender problematic is unlikely to be addressed. If, however, it also entails a considerable broadening of processes of policy analysis and dialogue (including, for example, mechanisms for policy revision and oversight by a broad range of stakeholders), it may have the potential to tackle the structural and informal underpinnings of inequality that still appear to exist in many policy areas.

1.2 Policies on gender and income distribution

The main international commitments concerning women’s rights and gender equality include articles that commit signatory governments to ensure gender equality in income distribution policies, including taxes and social benefits. EU Directives on equal treatment for women and men in social security schemes date from the late 1970s, and these have played an important role in many EU member states. Although individualisation of social and fiscal rights has more recently been recognised by the EU, many national social welfare and tax systems contain mechanisms that disadvantage many women and do not support gender equality in some spheres of life, such as family care.

A particular focus of EU social protection policies in recent years concerns national pensions strategies. A recent evaluation shows that current pensions strategies in EU countries do not ensure an adequate and equitable pension for women. One of the objectives of the EU strategy is to eliminate discrimination based on sex and to address the sources of gender-related inequalities in pension entitlements.

The European Social Policy Agenda also places some emphasis on gender issues and equality. The Strategy being followed to implement the Agenda – called the Social Inclusion Process – includes the elaboration of two-year National Action Plans against poverty and social exclusion by the EU member states, in which gender mainstreaming should be treated as a transversal principle.

1.3 Policies on gender and education

Gender inequalities in education have been the subject of considerable research and attention within international policies on gender equality. Somewhat surprisingly however, the leading international agencies that address gender issues – UNESCO and OECD – do not provide strong leadership on policies concerning gender equality in education, other than in specific contexts (development policy) or on specific issues, such as data, statistics and indicators.

With the EU, the organisation of education and training systems and the content of learning programmes are the responsibility of the member states, or their constituent regions. The EU plays a role by supporting and complementing national actions in certain areas. Gender issues have been taken into account in some areas, most notably concerning higher education and vocational training, and equal opportunities have been recognised as important. However, the treatment of gender has been limited, and the already gendered nature of the fields is not analysed or incorporated into policy.

Attention to gender within EU education policy reflects the high political priority placed on the entry of women into the labour market and, in particular, on the improvement of science and technology skills. Economic growth and competitiveness, based on a knowledge-based economy, are the main objectives. Gender equality objectives within EU education policy are limited to increasing recruitment in scientific and technical studies and ensuring gender equality in tertiary education and continuous training.

The most visible initiative by the European Union in the field of gender and education is the Women and Science programme of DG Research, which is aimed at promoting gender equality in science and research. Moreover, the objectives are supported by a comprehensive set of measures, supported by resources and institutional mechanisms within the Commission and at EU level with the Member States.

2. NATIONAL POLICIES ON GENDER EQUALITY AND GENDER MAINSTREAMING

2.1 Policy development

Through the influence of converging approaches to gender equality at international and EU levels since the mid 1990s, all the study countries have adopted official strategies for ensuring that public policies contribute to reduced inequalities between women and men. However, the trajectories followed by the study countries to reach this point, as well as the conceptual approaches to gender equality embodied – explicitly or implicitly - in the official strategies, vary significantly.

Overall, two phases of policy development can be identified in the study countries:

- the 1970s and early 1980s see significant legislative and institutional developments in support of equal rights and opportunities in almost all the study countries. Two exceptions are Belgium, where the main equal opportunities initiatives date from the late 1980s, and in Lithuania where they start in the early 1990s;
- from the late 1990s onwards all the study countries (or some of their constituent regions) take steps to establish policy and institutional mechanisms for a more integrated approach to gender equality in public policy, whether or not there is an explicit adoption of gender mainstreaming as the official strategy.

While campaigns to promote women's social and economic rights can be identified in many of the study countries prior to the 1970s, it is during the 1970s and early part of the 1980s that

most of the study countries witness important legislative and institutional reforms in support of equal opportunities and rights. In some cases, these result from indigenous pressure, especially from national feminist movements. The influence of indigenous movements is especially strong in Sweden and the UK, and to a lesser extent in Ireland, Belgium and France. The influence of political parties is notable in Spain and Greece, where the election of socialist or social democratic parties brought about significant improvements in the legislative and institutional architecture on gender equality. In all cases, EU and international (US, UN) influences were important, providing examples of good practice as well as giving legitimacy to indigenous demands for reform.

Only in Sweden, however, do the debates and discourse at this time focus on gender equality, whereby the explicit objective is equality of opportunities, rights and obligations between women and men. Elsewhere – for example in the UK and Ireland – the discourse and policy present women as a disadvantaged group, with the prevention of discrimination as the main objective. In other countries, such as Spain and France, the discourse concerns more the “emancipation” of women (or at least the “promotion” of women) rather than de facto equality between the sexes. In France strong traditions in support of the family and concerning neutrality (sameness) of treatment of all citizens limit the otherwise strong discourse on equalisation of rights and emancipation of women.

Strongly influenced by EU and UN policy developments, the mid to late 1990s witness a new phase in approaches to gender equality in public policy in all the study countries. Most countries explicitly adopt gender mainstreaming as the official strategy to achieve gender equality (or equal opportunities), and most of them establish – or adapt – institutional machinery and methods to implement the strategy. In Lithuania, a landmark is achieved with the adoption in 1999 of the Law on Equal Opportunities, the first country in Eastern and Central Europe to do so. In countries, such as Spain, with an established approach to equal opportunities (an institutional structure at central and regional levels supported by equality plans based around positive actions) the progression to a gender mainstreaming approach comes a little later. Only in December 2002 does the Spanish parliament approve a proposal to subject all new legislation to gender impact assessment procedures.

However, the common discourse on “gender mainstreaming” masks considerable variation of approaches, and researchers and feminist activists in many of the study countries reflect critically on the actual implementation and impact of this new strategy. In the UK and Ireland, an integrated approach to equality is adopted, grouping together all forms of (in)equality. In Greece, positive action is strongly defended by women’s organisations, concerned about the potential weakness of gender mainstreaming in combating much de facto inequality, especially when implemented by (male-dominated) institutions and mechanisms.

Two other features of public policy on gender equality in the study countries should be noted. One feature is the predominant concern across the study countries with equality in employment and the labour market (raising questions about the primary purpose of much gender equality legislation, given the neo-liberal economic and political context of public policies, regardless of the political character of the governments concerned). The other feature concerns the character of public administrations that appear to provide most active support to gender equality policies. Administrative level may be a relevant variable, with the regional level appearing – in some national contexts - to be potentially significant in pushing forward action on gender equality: this is evident in Spain, France and Belgium, and also in the UK since devolution in 1999. The political orientation of governments may also be relevant, with social democratic or socialist parties appearing to be important influences in some countries.

2.2 Institutional architecture

In parallel with the policy developments of the 1970s and early 1980s, most of the study countries established institutional mechanisms to support gender equality legislation and policy. At its fullest extent, the institutional machinery includes structures at Government, Parliament and non-Governmental levels.

Only in Sweden is there a Ministry with unique responsibility for gender equality, with a place in Cabinet. In addition, there is a Division for Gender Equality within the Ministry of Industry.

In the UK, there are a Women's and Equality Unit and two Ministers for Women and Equality, located in the Cabinet Office (although with no place in the Cabinet). Since devolution in 1999, similar Units have been established in the devolved executives. Between 1993 and 1995, Ireland had a Minister for Equality, which was subsequently merged with the Department of Justice, creating the Department of Justice, Equality and Law Reform. In both the UK and Ireland, institutional changes reflect a broadening of equality, which expert observers have assessed as reducing the prominence of gender equality policies.

In other countries too, there are bodies – autonomous or not – responsible for gender within other Ministries. More typically, responsibility for gender equality is located within one particular Ministry, often Employment and/or Social Affairs. In Belgium, at federal level, the Minister of Employment, Labour and Equal Opportunities has powers and responsibility for equal opportunities. The Department of Equal Opportunities, established in 1993, is currently being replaced with an Equality Institute, focused specifically on gender equality, with powers to take legal action to enforce legislation and to monitor and support gender equality. The Women's Institute in Spain is a high-profile autonomous body, located within the Ministry of Employment and Social Affairs. While it has no power to force other Ministries to implement the equality plans, it plays a strong co-ordinating role at central, regional and local levels. In France, the Women's Rights and Equality Unit is located within the Ministry of Employment, Social Affairs and Solidarity.

In Greece, the General Secretariat for Equality is the Government body with responsibility for planning and implementing equality policies, located in the Ministry of Interior, Public Administration and Decentralisation. Since 1994, Lithuania has a Government position of State Counsellor on Women's Issues, a post that is currently held by the State Counsellor on Foreign Relations and Relations with NGOs. In addition, gender posts are located in the Ministry of Social Security and Department of Statistics.

Regional equality bodies – in regional or decentralized administrations - now exist in many countries, and play important roles in promoting gender equality policies and action plans, notably in Belgium (especially in the Flemish region), Spain, Greece, France, Sweden and the UK (in the devolved regions).

Statutory gender equality bodies with the power to enforce equality legislation exist in Belgium (the Equality Institute, established in 2003), Sweden and Lithuania (in both cases, an Equal Opportunities Ombudsman), the UK (the Equal Opportunities Commission) and Ireland (since 1999, called the Equality Authority). As has been established in Ireland, the UK is considering the creation of one body, with responsibility for all equality issues. Contrary to this trend, Belgium has recently strengthened the specific treatment of gender equality.

In some countries, bodies – with greater or lesser autonomy from the Government - charged with responsibility for providing information and research on equality issues and/or for monitoring and evaluating the impact of policies on women have been created: the Observatory of Equal Opportunities in the Ministry of Employment and Social Affairs in Spain; the Research Institute for Gender Equality (KETHI) in Greece; and the Observatory on

Equality and information centres at national and regional levels (CNIDFF and CIDFF) in France. In Belgium, the Equality Institute will play this role.

Institutional mechanisms for co-ordinating across Ministries exist in some but not all of the study countries. In France an Inter-Ministerial Council on Women's Rights has existed since 1982. Since the 2001 election of the Labour Government, there is a Ministerial Sub-Committee on Equality in the UK (but with a broad remit on equality). In Greece, an Inter-Ministerial Committee for Gender Equality has been established. In Belgium the federal Government has called for an inter-ministerial conference on equality to co-ordinate actions at different decision-making levels.

Similarly, Parliamentary Committees exist in some but not all of the study countries. Spain has had an All-Party Parliamentary Committee since 1990. In Ireland, a Parliamentary Committee on Women's Rights existed since 1983; since 1997 women's issues are dealt with by the Parliamentary Committee on Justice, Equality, Defence and Women's Rights (leading, as noted by some observers, to reduced parliamentary awareness about gender and weakened dialogue on gender issues between parliament and other actors). At UK level, there is no Parliamentary Committee on Women or Equality, although these exist in the devolved Parliaments for Northern Ireland, Wales and Scotland (the latter having a particularly high profile). In Greece too, there is a Parliamentary Committee concerned with equal opportunities for women and men.

Concerning the existence of bodies within the institutional architecture for gender mainstreaming that represent civil society interests, these exist in some of the study countries, supported by Government funding. In Sweden, the Council on Equality Issues represents NGOs. In the UK, the Women's National Commission has acted as the official independent advisory body, composed of women's organisations, since 1969. In Ireland, a similar body – now called the National Women's Council – represents non-governmental interests and plays an important role advocating for gender issues, monitoring policy and as a social partner.

2.3 Methods and procedures

The recent adoption of a gender mainstreaming approach in public policy is evident by the relative paucity of methods and procedures in the study countries to support the systematic integration of a gender perspective across different policy domains.

The most comprehensive approach is followed in Sweden, where gender impact assessments are made of policy proposals, training of officials is undertaken and legislation ensures that (unless otherwise justified) all statistics must be disaggregated by sex and reflect gender issues. In addition, various organisations have developed and use methods for taking into account gender equality issues in their programmes and services, such as the 3R method used by local authorities and equality labelling of companies.

Legislative tools and sex-disaggregated statistics are in wide use as methods for integrating gender equality into public policy. Recent initiatives on gender statistics have been taken in the Belgium, UK, France and Lithuania. Legislation to improve the participation of women in decision-making has been introduced in a number of countries. In Belgium, initiatives to promote women's participation in policy-making date from the early 1990s. In France, a law introduced in 2000 covers parity in elections, while in Greece there has been recent adoption of a 1/3 quota for participation of women in regional elections and public sector decision-making.

Equality plans are also used as a tool, most notably in Spain where a series of national, regional and local equality plans in favour of women has been developed since 1988. Although these are presented as a first step towards gender mainstreaming, expert observers

have noted that they fail to integrate a gender perspective across public policy domains. In France regional equality plans are a new development, and in Belgium the Strategic Plan for Equality is the main mechanism for mainstreaming at federal government level.

Apart from Sweden, national “tool kits” for taking gender inequality into account in public policy are in the early stages of development. The UK has used a method for appraising policies for equal treatment since 1992 (PAET), but this is criticised by independent experts as being very limited in scope and impact and for the absence of any machinery for follow-up and monitoring of the appraised policies. More recently, the Women’s and Equality Unit has developed a more pro-active method (Gender Impact Assessment Framework), which may be more effective in integrating gender equality into policy. In Belgium, the Flemish community has developed a number of tools for gender assessment, suitable for policies at regional and local level. However, the Council of Flemish Women notes limitations with these tools and argues that their successful use depends on knowledge of gender concepts and issues and the availability of gender statistics.

In Ireland a very limited gender proofing tool (mostly monitoring rates of participation of women in programmes) has been in use, and a more robust tool for gender impact assessment is now being developed. The use of such tools has primarily been in the context of European Structural Fund supported programmes, as is also the case in Greece, where ex-ante evaluation from an equal opportunities perspective is being newly developed.

2.4 Non-governmental actors

Concerning the role of non-governmental actors in pushing forward gender equality in public policy, national variations between the study countries appear to be strong. In Spain and the UK, political parties (and, more specifically, women organising within social democratic and left political parties) have been key influences on gender equality legislation and policy. In both these countries, there has been weak involvement of the women’s movement, either because of the weakness of the women’s movement (as in Spain) or because of the closed nature of policy-making (as in the UK).

Women’s organisations have been important influences in other countries; this is true in Sweden, Greece, France, Ireland and, more recently, Lithuania. In some countries (Sweden, Ireland and, in the future, in Lithuania) these have umbrella associations, with a formal involvement in policy dialogue and decision-making. In others, such as France and Greece, their influence on legislation and policy has been strong but less direct. In Greece, the influence of women’s organisations appears to arise from their involvement in national, European and international networks. The influence of the European Women’s Lobby is strong in a number of countries, including Greece and Sweden.

2.5 Facilitators and barriers

The state of the art reports identify a number of factors that appear to act as facilitators or barriers to gender equality in public policy. Only a preliminary identification of factors is possible from the available literature, and an important contribution of the research study will be to gain a more profound understanding of the barriers and facilitators to gender-sensitive public policy.

The factors identified through the literature review raise a number of issues for further study by the research:

- It is clear that the political character of the government is a key factor. The election of socialist or social democratic governments in Greece and Spain was a significant facilitator. In France, social democratic and socialist parties have also been influential.

But in the UK the New Labour (social democratic) government tends to support conservative notions of family and community. What are the political factors that facilitate or hinder the advancement of gender equality in public policy?

- The wider policy context may also be an important limiting factor on gender equality. In Sweden the legislation is limited to working life, while in France – as in the UK – policy traditions concerning the family are strong.
- Traditions of public policy formulation and implementation can hinder or help attention to gender equality. At central level in the UK, the relatively closed tradition of public policy making has been a barrier, while the process of devolution – and opening up of policy making to civil society – has been a facilitator at decentralized levels. Devolution has been a factor in Belgium, with the Flemish region and community taking significant initiatives in the field of gender mainstreaming.
- The extent of (de)centralization of policy making may be an important factor. In Spain, there is a high degree of decentralization, but high levels of cooperation concerning gender equality between national and regional levels. In Sweden the highly centralized system may facilitate, but may also limit, the treatment of gender equality.
- Civil society women's organisations are evidently important facilitators in many countries, but the existence of a women's movement is not a guarantee that they influence public policy. What factors enable the women's movement to be a positive influence on gender equality in public policy?
- The existence or absence of research and studies on women and equality may be another factor. In some countries, such as France and Belgium, feminist studies and research appear to be a key influence.
- The influence of EU and international developments has been strong in many countries (especially in Belgium, Spain, Greece, UK and Lithuania), bringing about important legislative improvements. But the "importation" of gender mainstreaming does not always sit easily with national concepts and discourse, and may not be suited to some policy cultures. For example, it may be too technical for Greece, in comparison to positive actions. In France too gender mainstreaming does not sit easily with the tradition of positive actions.
- The influence of the EU may also limit gender to certain policy spheres and programmes, for example those covered by the European Structural Funds. On the other hand, the introduction of a culture of evaluation and monitoring through EU funding requirements may be a positive influence in some countries. In Spain and Greece, the lack of a culture of policy evaluation is a barrier, while in Ireland the tradition of policy proofing is a facilitator.
- The tradition of – and trend towards – treating gender equality alongside, and in a similar way as, other forms of inequality may be downgrading gender equality as a policy priority. It may also be a barrier to the adequate treatment of gender equality in policy, because the specificities of gender as a point of differentiation and inequality are not taken into account. While in the UK and Ireland there is a trend towards generalising equality, in Belgium the contrary trend is in evidence.
- The persistence of patriarchal and sexist attitudes should not be under-stated. These are observed as strong barriers in Lithuania and Greece, but the literature from Sweden also identifies "gender schemas" (attitudes and behaviour that favour men over women) as potent factors in explaining slow progress on gender equality.

3. GENDER IN SOCIAL PROTECTION AND TAX POLICIES

3.1 Gender issues in social protection and tax systems

The past two decades have seen considerable changes in social security and tax systems in many of the study countries, to bring systems in line with EU Directives (particularly on equal treatment) and to encourage the participation of women in the labour market. While the most directly discriminatory conditions have been removed in most countries, gender inequalities remain in the effects of social security and tax systems on gender equality. And in all countries there are gender inequalities in income, principally because of the unequal participation of women and men in paid employment and in unpaid family care.

Although Sweden's system has been based for some time on a dual breadwinner model (which is aimed at integrating women into paid work and ensuring equality for all citizens), the single (male) breadwinner model still underpins social security and tax systems in other countries. While Sweden has had an individualised system of taxation since 1971, this has been introduced only recently into other countries. In Ireland it is offered as an option to couples. But in other countries – including Belgium, France and the UK – there is still no individualised system of taxation.

The tension between encouraging higher levels of labour market participation, especially of women, and protecting the (traditional) family is evident in many countries. In all countries the individual is the subject of labour market policy, while the family unit remains the main subject of social protection systems in a number of countries.

Social protection in Greece is underpinned by a strong breadwinner model, and the Greek welfare regime is characterised as traditional and family-centred, treating women mainly as dependants. The system of social protection in France is also family-centred, in spite of progressive responses by the state to changes in the character of the family. Inequalities in the labour market and the asymmetry of family roles between women and men, combined with a derived rights system, means that women's situation is negatively affected. Lithuania established a new social security system in 1991, but families and children (not women) are the main subjects of the system.

Tax arrangements in the UK treat the couple as one unit and promote a male breadwinner model. The main thrust of taxation reforms in the UK has been to get people into work. Gender has not been prominent as an issue; rather the focus has been on households and families. Any gender effects of the reforms have been (unintended) spin-offs.

However, in the UK women have been the primary beneficiaries of the introduction of a national minimum wage, and of new tax credits (working tax credit, child tax credit). There were some concerns by women's organisations that the effects would be to discourage women (particular second earners) from paid employment; some of these concerns have been addressed by changes to the tax credit system in 2002. In Ireland too, reforms to the tax system make it more neutral to married women's employment.

As a job creation measure, France reduced social contributions, but the effects may not be gender-neutral and may risk reinforcing the trap of part-time and low-skilled work, where women are disproportionately represented. Also the reduction of taxes for low paid workers may have a negative effect for the second income amongst dual earning couples.

Differences in employment status and remuneration – and the ways these are treated in social insurance systems – have a significant effect on gender equality in incomes over an individual's lifetime. The Spanish social insurance system indirectly discriminates against women who are not active in the labour market as well as women working in particular sectors of the economy such as farming and domestic work. In Greece too, social security

benefits are strongly related to employment status, thereby maintaining gender distinctions. As in Ireland, EU Directives have brought about important changes, but gender inequalities remain.

In the UK and Ireland, both of which have two-tier social protection systems combining means-tested benefits and social insurance, men have tended to claim the higher-paying social insurance benefits, while women rely more on means-tested benefits.

Pensions have also been the subject of recent reforms, some of which have important effects on gender equality. The reform of the Swedish pensions system in 1999 introduced pensions based on the total income during an individual's lifetime, as opposed to the maximum duration in the systems of other countries. But even in Sweden women usually get lower pensions, because their incomes are lower. In Greece, the pension system makes it difficult for women to obtain an adequate pension of their own because it is strongly biased towards highly paid full-time continuous employment. Reforms of the French pensions system (a mixed contributory and non-contribution system) in the early 1990s took the gender dimension into account, and may improve gender equality of pensions, at least for some groups.

There have been a number of other recent developments in the area of social protection, which are gender-sensitive. Since 2001, Belgium has made childcare expenses for children between 0-3 years 100% tax deductible and extended paternity leave. In Spain, new legislation on reconciling work and family life allows fathers to take up to 10 weeks paid leave available to a couple on the birth of a child. Parental benefit in Sweden is organised so that – if taken up – one parent must take at least 60 days paid leave (introduced in 1995). In France, improvements in parental leave for sick children – whereby a higher allowance is paid if the leave is shared by the father and mother – are more supportive of gender equality.

But more gender-sensitive measures do not always lead to improved equality of outcome. In Lithuania, fathers and mothers can now take parental leave, but fathers do not take advantage of these benefits except in rare cases. Moreover, there are many provisions to protect women employees (especially pregnant women and those with young children); as a result employers tends not to employ young women especially in fields that require higher-level training costs. In Spain, the approach taken is to provide a tax credit for working mothers with children under three years of age, while some regions have introduced a salary for carers (a programme that is intended to be extended nationwide).

3.2 Mainstreaming of gender equality in tax and social protection systems

In contrast to the depth and scope of gender issues involved in tax and social protection systems, there is little explicit mainstreaming of gender in these policy domains in most of the study countries. In Sweden, no specific instruments for gender mainstreaming in tax and social protection appear to have been developed, although the general system for ensuring that gender equality is taken into account in policy is assumed to apply. Similarly in Spain the general tool for promoting gender equality – i.e. the equality plan – is the principal means of improving gender equality in these specific domains. The equality plans contain measures (e.g. studies, evaluations and policy changes) aimed at improving women's access to social rights and combating women's poverty.

In the UK, it is not known if the recent reforms of tax and social security have been subject to equality proofing, and there is no evidence of efforts or plans to mainstream gender in social protection and tax policies.

A number of factors that appear to limit or facilitate attention to gender in tax and social protection policies are identified by the state of the art reports:

- The degree of centralisation of policy-making and implementation is an important factor. In most countries policy-making on tax and social protection is highly centralised and is a domain more or less exclusively influenced by the state.
- Trade unions (and social partners in general) have facilitated attention to gender issues in tax and social protection, where they are involved in national processes of dialogue and partnerships, as in France and Ireland. In Greece, they have limited access to policy-making in these domains, and are not an influence.
- Women's organisations – state and non-governmental – have in general not prioritised tax and social protection issues. This is true in Spain and the UK. In Ireland the National Women's Council has been active in lobbying on income-related issues, but otherwise there is no strong lobby group on women's economic interests and low priority is placed on gender issues in social protection and tax policy. On the other hand, where women's organisations have raised issues concerning tax and social protection they have not always been listened to, as in the case of Greece.
- A major influence in many countries has been EU legislation on equal treatment for women and men in tax and social protection systems.
- More recently, the EU Social Policy Agenda and the 2001 National Action Plans on Social Inclusion (NAP/Incl) are potentially important instruments, because of the requirement to mainstream gender in the NAPs. This is the case in Belgium, Greece, France and Spain. However, in the Spanish and French NAPs/Incl women are treated as a vulnerable group (going against main tenets of gender mainstreaming). The 2001 Irish NAP/Incl contained no new initiatives and gender was not mainstreamed.
- An emerging influence may be the gender budgeting initiatives, driven at international level and in some countries (in this respect the recent formation of a Women's Budget Group in the UK is noteworthy).
- Limited research on gender in social protection and tax policy appears to hinder policy improvements. This is identified in Greece and Lithuania as a barrier to gender mainstreaming in these domains.

4. GENDER EQUALITY IN EDUCATION POLICIES

4.1 Treatment of gender equality in education policies

Recent legislative and policy initiatives in education in most of the study countries reaffirm the objective of ensuring gender equality in education. The persistence of marked gender disparities across subjects and disciplines is one reason for these initiatives in many countries. Subject choice shows marked gender differences in all countries, resulting in part from a combination of auto-selection and informal mechanisms of discouragement/exclusion, which appear difficult to overcome. In spite of the common problems, there appear to be significant differences in the importance placed on gender equality in education between the study countries, and in the approaches being taken.

At one end of the spectrum is England, where - unlike other UK regions - gender equality in education appears not to be on the current policy agenda. Two recent policy documents on education in England make no mention of gender equality and or of gender issues. The Equal Opportunities Commission has suggested that this may result in new forms of gender segregation. Initiatives (positive actions) are, however, being taken by individual institutions or partnerships in the UK to tackle specific disparities, such as underachievement of

secondary-schools boys or the low participation of girls and women in science, engineering and technology.

In Spain too there appears to be declining attention to gender equality in education in recent years, at least at national level. Legislation passed in 1990 covered equality between the sexes in all educational activities, including design of materials (to eliminate sex stereotyping) and introduction of horizontal subjects to the curriculum, including issues of gender equality. However, the greatest impact on equality in education was made by the first equality plan (88-90). Since then, there have been decreasing numbers of measures in subsequent plans, leading to criticisms from women's associations.

At the other end of the spectrum are Ireland and Greece, which have taken initiatives in recent years to promote gender equality in education, inspired by European policy developments (or funding requirements). In Greece, legislation passed in 1982 eliminated the remaining forms of gender inequality in access to education. However, the main force for change in respect of gender equality in education is the EU. Educational policies in Greece are currently developed within the framework of the Operational Programme, which receives substantial European Social Fund support and thus requires the mainstreaming of gender. There is a gender dimension in four out of six components of the Operational Programme for Education and Initial Vocational Training, either in the form of positive actions or mainstreaming.

Although the Government in Ireland has failed in the past to address gender inequalities in education (perhaps because of the traditional influence of the churches in education), some recent and ongoing measures aim to improve the situation. These include positive action programmes, the integration of equality in educational legislation and policy, compilation of sex-disaggregated statistics and the creation of a gender equality unit in the Department of Education and Science. There are also some interesting recent initiatives to tackle gender inequalities in the curriculum.

In Belgium, issues of equal opportunities in general, rather than gender equality specifically, are addressed by education authorities in the French-speaking Community. Only in the Flemish Community have there been initiatives, since the early 1990s, to diversify the study options of female students

France too has taken steps in recent years to promote gender equality in education. Education policy in France, which has been subject to a process of decentralisation, has contained a consistent approach to equality in education since 1998. In 1999-2000 the signing of an Inter-Ministerial agreement promoting equality in the educational system - which included raising the awareness of teachers, adaptation of teaching tools, etc. - has been followed by a number of actions, including a focus on girls and women in science. Various institutional mechanisms (an inter-ministerial committee, a mission for equality, piloting committees to decentralized levels) have been established to support this policy initiative.

Lithuania too is starting to tackle gender inequality in education, as part of its general support for equal opportunities. In Lithuania, there is slightly higher female participation at upper secondary and tertiary education than male participation, but as elsewhere there is marked gender differentiation in subject choice. The Law on Equal Opportunities covers education, and the Equal Opportunities Ombudsman can inspect educational institutions.

Even in Sweden gender- and class-based divisions in education still exist, and there have been recent legislative reaffirmations of the principle of gender equality in education. Primary school and adult education is regarded as decisive. Universities are obliged to establish gender equality plans and to take measures to improve gender balance across disciplines and subjects, and to increase the proportion of female teachers and researchers. Strategies have included

positive actions, such as the reservation of university posts for women, but the legitimacy of this particular approach has been challenged by the EU.

4.2 Forces for change concerning gender equality in education

Increased attention to gender equality in education in the study countries has been influenced by a number of developments. European Union policy, and in particular the requirements of EU funding for education and training programmes, has had a fairly direct influence in some of the study countries, most notably Greece and Ireland. Similar changes may be witnessed in Lithuania once EU funding for education and training programmes is available.

In other countries, decentralization appears to open up opportunities for policy developments on gender equality in education. This can be seen in the devolved UK regions, for instance in Wales, where significant initiatives to promote gender equality have been taken since devolution. In Spain, the decentralised model of government is seen as a potential facilitator, as regional women's agencies are strategically placed to work in close collaboration with regional education departments, schools and women's and parents' associations. The same opportunities for social partnerships, and closer networking between state and non-government actors, may apply in the newly devolved regions in the UK, but not where education policy remains highly centralized (as in England).

In France, where education policy is highly centralized, institutional mechanisms for promoting gender equality in education have been established at central and regional levels. Assessment of the relative influences of these levels of authority on changes in gender equality in education may be revealing of the interplay between centralized and decentralized levels.

Institutional actors promoting gender equality in education vary somewhat between the study countries. In only some countries do there appear to be active social partnerships – or significant non-governmental actors – promoting gender equality in education. In Spain the social democratic party has been the main actor, with actions being supported by the main parents' association, which supports secular, public education. The role of political parties (or at least the “closeness” between political and administrative institutions) may be a factor in other countries or regions; in Wales, unlike in England, the elected Assembly appears to play a more significant role, assisted actively by the Equal Opportunities Commission. In Greece, on the other hand, there are few or no non-governmental actors, and the external influence of the EU has been the primary factor in promoting change. The same is true for Lithuania.

Barriers to gender equality in education clearly remain. The experiences in Sweden highlight the persistence of gender inequalities in participation in education, and in the education system, even where formal obstacles have been absent for some time. The persistence of informal barriers (social, cultural, psychological) raises questions about the adequacy of the measures being taken to promote gender equality in education. Some research in Sweden suggests that the lack of appropriate methods is a barrier to ensuring gender equality in education.

In other countries, such as Greece and Lithuania, the lack of research (basic information and knowledge) appears to be a key obstacle. In Ireland, this barrier has started to be tackled through the collection of sex-disaggregated data and provision of grants for research on gender and education. The link between policy and research may also be indicated by the case of Belgium; it is the Flemish community, where centres for gender studies are active at most Flemish universities, which has been most active in support of gender equality in education policy.

The traditional involvement of the religious institutions in education is identified as a barrier in some countries, most notably in Spain and Ireland. In Spain, the Catholic Church has supported sex-segregation of schools and is resistant to gender equality in education. While formal barriers may no longer exist, attitudinal and informal obstacles may still arise from the influence of religious institutions. Research in Ireland shows that the churches have exercised important control over the ethos or hidden curriculum of schools.

**EQUAPOL: Gender Sensitive and Women Friendly Public Policies: A
Comparative Analysis of Their Progress and Impact**

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INTERNATIONAL STATE OF THE ART REPORT:

Gender Equality Policy from a European and International Perspective

Deliverable Number 1

Dr Mary Braithwaite,
KEKMOKOP, Panteion University Athens
and
Sara Clavero
School of Sociology and Social Policy
Queen's University, Belfast
Northern Ireland

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1. EUROPEAN POLICY FRAMEWORK ON GENDER EQUALITY

1.1 Equal Treatment

European Union (EU) policy on gender equality has a long history. Its origins lie in Article 119 of the EEC Treaty on equal pay and on the jurisprudence of the European Court of Justice, which created legally enforceable rights to equal pay and equal treatment in the workplace. Later on, a series of Council Directives further established a general framework for equal treatment in employment and occupation (Jacqmain 2000; Koukoulis-Spiliotopoulos 2001).

Equal treatment is focused on providing equal access and correcting existing inequalities in legislation, so that individual citizens are formally equal. This approach is framed in a liberal ideology, according to which it is up to individual citizens to make use of their formal equal rights. According to Rees (1998), while this approach is an essential element of any equal opportunities policy, it is seriously flawed. In focusing exclusively on the formal rights of women as workers rather than on outcomes, it fails to address the fundamental causes of gender inequality, which lie in the informal gender contracts between women and men. Granting equal access to men and women will thus only benefit those women whose cultural capital, experiences, family circumstances and share of domestic responsibilities are similar to those of men as a group.

[Gender contracts are defined by Duncan as a rough social consensus on what women and men do, think and are. They inform expectations about the domestic division of labour and power relations which, in turn, shape systems and structures that reinforce those expectations (Duncan 1996; Rees 1998)].

1.2 Positive Action

The limitations of a purely legislative approach based on the concept of equal treatment were recognised early on. Influenced by anglo-saxon debates and international treaties of the United Nations (UN) and International Labour Organisation (ILO), the concept of equal opportunities appeared in Community law (Vogel-Polsky 2001). And in order to tackle discriminations based on sex, the adoption of temporary and remedial positive actions (or positive discrimination) in favour of women was allowed by law. Positive actions include both individual measures aimed at remedying easily-identifiable indirect discriminations, and strategies to reform rules and procedures as well as attitudes and values that have a discriminatory effect.

In addition, the European Union introduced a series of positive action programmes in the course of the 1980s and 1990s. These broadened the scope of policy initiatives on gender equality considerably (including *inter alia* child care, women in decision-making, the role of the media, violence against women).

According to Rees (1998), the positive action approach shifts the emphasis from equality of access to creating conditions more likely to result in equality of outcome, in order to counterbalance the unequal starting positions of men and women. Positive action involves the adoption of specific actions on behalf of women in order to create a level playing field. In other words, what these measures do is to address the ways in which women are disadvantaged compared to men. Despite these differences between equal treatment and positive action, both approaches share in common the fact that they are principally concerned with the distribution of positions within hierarchies rather than with challenging the structural status quo.

Some scholars have made positive assessments of the legislative framework and policy agenda on equal treatment and positive action, arguing that it provides a strong legal resource for improved gender equality (Stone, Sweet and Caporaso 1996; Cichowski 1998). Others, however, have been far more critical of the scope and effects of EU equal opportunities policy (Rees 1998; Hoskyns 1996; Elman 1997). In this more critical perspective, the improved rights for women focus on a narrow, neoliberal (economic) agenda, being concerned almost exclusively with women's workforce participation.

Moreover, the legal value of the principle of equal opportunities is not defined in Community law (and is therefore not clear); and the application of positive action is still the subject of considerable legal controversy (Charpentier 1999; Vogel-Polsky 2001).

1.3 Gender Mainstreaming

As early as 1991, in the Third Community Action Programme on Equal Opportunities between Women and Men 1991-1995, the term "mainstreaming" was introduced for the first time. The aim was to ensure the explicit and progressive integration of equal opportunities and the specific problems of women in the labour market into all Community policies and programmes as appropriate. Mainstreaming was intended to tackle the structural causes of inequality. Initiated at that point by the UK, mainstreaming was an original concept; in practice it was poorly understood and few actions were undertaken to put it into effect during much of the period of the Third Programme (Sensi and Wuame 1994).

Researchers and practitioners of "gender mainstreaming" frequently use the arguments of "equity" and "efficiency" as justifications for why gender mainstreaming is important and why gender should be taken into account in public policy. The equity argument is clear and depends on basic notions of human rights and social justice. The efficiency argument – that by taking into account the "gender dimension" we produce better public policy – is however an untested hypothesis in many fields. As the Danish Minister for Labour said at an OECD-Nordic Council conference in 2000 on 'Gender Mainstreaming: Competitiveness and Growth': *"The incorporation of the equality perspective in ordinary policy fields leads to quality improvements and will benefit our society... (but) the allegation that the incorporation of the gender perspective leads to quality improvements will, of course, have to be substantiated"*.

The widespread adoption of the "gender mainstreaming" approach within EU public policy came as a result of preparations by the European institutions and Member State governments for the Fourth World Conference on Women, held in Beijing in September 1995 (Pollack and Hafner-Burton 2000) – see section 2 below. Following the Conference, a Commission Communication was adopted on "Incorporating equal opportunities for women and men into all Community policies and activities" (EC 1996). This Communication is the first EC statement on the application of a gender mainstreaming approach to all Community policy and programmes, and defines what the approach means (see section 1.2 below).

The legal base for European Community action in favour of gender equality was considerably strengthened by the ratification of the Amsterdam Treaty, which entered into force on May 1 1999 (EU 1999). Articles 2 and 3 of the Treaty formalised the European Community commitment to gender mainstreaming, by establishing equality between men and women as a specific task of the Community as well as a horizontal objective affecting all Community tasks. Article 3 states that "In all its activities the Community shall aim to eliminate inequalities and to promote equality between women and men".

The adoption of the strategy of gender mainstreaming by the EU is considered by many scholars to be of considerable potential significance in tackling the structural – and broad-based – nature of gender inequality (Pollack and Hafner-Burton 2000; Vogel-Polsky and

Beauchesne 2001). However, there are also warnings. As Vogel-Polsky and Beauchesne (2001) point out, its application requires a vast knowledge of the mechanisms of segregation and of gender relations, as well as the capacity (and will) to analyse social contracts and policies at all levels of decision (European, national, regional and local).

In addition, there are trends, both at national level (notably in the UK and Ireland) and at European level, in the debates on Article 13 of the Amsterdam Treaty concerning anti-discrimination, to generalise “equality” or “equal opportunities” to cover all forms of discrimination, as if women are one special interest / minority group amongst others.

2. INTERNATIONAL POLICY FRAMEWORK ON GENDER EQUALITY AND MAINSTREAMING

There is no international legal text that recognises the right to equality of women and men (Vogel-Polsky 2001). On the other hand, there are a huge number of statements and “commitments” which refer to equality between women and men, to equality of treatment without discrimination and the right to equal opportunities. The two most significant international instruments are CEDAW and the UN World Conferences on Women.

The Convention on the Elimination of All Forms of Discrimination against Women (CEDAW) was adopted in 1979 by the UN General Assembly and forms an international bill of rights for women. It defines what constitutes discrimination against women and sets an agenda for national action to end such discrimination. As of June 2002, 170 countries are party to the Convention and an additional three had signed the treaty, binding themselves to do nothing in contravention of its terms.

While previous UN World Conferences on Women had played a significant role in pushing forward awareness and action on women’s inequality at international and national levels, the 1995 Conference in Beijing introduced the concept of gender mainstreaming to the mainstream of international and national public policy. In adopting the Beijing Declaration and Platform for Action, signatory Governments committed themselves *inter alia* to “implement the Platform for Action, ensuring that a gender perspective is reflected in all our policies and programmes” (UN 1995).

The Platform of Action set the overall goals of achieving gender equality, development and peace, and identified twelve critical areas for priority action: women and poverty; education and training of women; women and health; violence against women; women and armed conflict; women and the economy; women in power and decision-making; institutional mechanisms for the advancement of women; human rights of women; women and the media; women and the environment; the girl-child.

In 2000, signatories to the Declaration and Platform for Action came together to review progress and to reaffirm the goals and objectives set in 1995, noting the importance of “mainstreaming a gender perspective into all policies and programmes and promoting the full participation and empowerment of women” (UN 2000).

3. DEFINITIONS OF GENDER MAINSTREAMING

With strong political support at international and national levels, “gender mainstreaming” has become official policy for the majority of national governments and for the international community as a whole. The rapid global adoption of the approach within official policy has, however, run ahead of clear agreement on the precise objectives of the approach and on how it can be applied in practice. Moreover, the conceptual difficulties (and intellectual resistances) that have arisen when the main (English) terms – gender and mainstreaming –

have been translated into other languages have compounded the lack of clarity of meaning (Labourie-Racapé and Locoh 1998; Labourie-Racapé 1999).

The concept of gender mainstreaming has also been defined and articulated in contrast to other policy approaches to gender equality issues such as equal pay and positive action/positive discrimination. However, in reports, recommendations and policy briefs issued by bodies such as the UN, Council of Europe and European Commission, gender mainstreaming is always put forward as a complement to those other approaches rather than as a replacement. In contrast to these two approaches, gender mainstreaming is viewed as turning attention from the individual and their rights, or their deficiencies and disadvantages to those systems and structures that produce those deficiencies and disadvantages in the first place.

The OECD *Sourcebook on Concepts and Approaches Linked to Gender Equality* (1998, p.13-14) describes the evolution of thinking on gender equality as moving from i) initial analyses focused on women and their relation to the economy and development processes and initiatives focused on compensatory measures to enable women to participate more fully, to ii) analyses that focused not on women but on the processes and relations that recreate and reinforce inequalities between women and men. This new focus has resulted in the following:

- emphasis on reshaping the mainstream rather than adding activities at the margin;
- focus on equality as an objective rather than on women as a target group;
- focus on the broader policy and institutional context as well as project initiatives;
- moving beyond responding to gender differences, and increasing attention to reducing gender disparities;
- more attention to women's organisations and networks, and the forces for change in partner countries;
- more attention to men.

Some attempts to formally define gender mainstreaming and to explain how it can be made operational can be seen in recent work carried out by the United Nations (UNIFEM, UNDP, ECOSOC), the OECD (1998) and the Council of Europe (1998). A report of the Council of Europe's Group of Specialists has been particularly influential at European level. In their final report, the term is defined as follows (1998:15):

'Gender mainstreaming is the (re)organisation, improvement, development and evaluation of policy processes, so that a gender equality perspective is incorporated in all policies at all levels and at all stages, by the actors normally involved in policy making.'

According to the Group of Specialists' report, this definition of gender mainstreaming makes it clear that the main goal of mainstreaming is to achieve gender equality and that the process involves the reorganisation, improvement, development and evaluation of policy processes. The objects of mainstreaming are all policies at all levels and at all stages, and its active subjects are ordinary policy actors. Moreover, according to the Group of Specialists (1998:14), the Council of Europe's definition of gender mainstreaming presents a number of advantages over other definitions, especially its acknowledgement that gender mainstreaming is a political process as well as a technical one, and the fact that it is not limited to partial aspects and specific techniques of mainstreaming.

The Council of Europe's definition implies that mainstreaming involves not only new ways of devising policies but changes in organisational and institutional culture, leading to changes in societal structures; its transformative character is underlined. Secondly, it allows for a variety of tools and techniques to be used, which marks an improvement over (more limited)

definitions where gender mainstreaming is reduced to a particular technique or tool such as the screening of policy proposals from a gender perspective (Gender Impact Assessment). According to the Group of Specialists, when gender mainstreaming is reduced to a policy technique, the distinction between the goal of gender mainstreaming and gender mainstreaming itself is blurred; gender mainstreaming then becomes an end in itself rather than a strategy to achieve a particular goal.

The EC's definition of gender mainstreaming is expressed as follows:

'Gender mainstreaming involves not restricting efforts to promote equality to implementation of specific measures to help women, but mobilising all general policies and measures specifically for the purpose of achieving equality by actively and openly taking into account at the planning stage their possible effects on the respective situation of men and women (gender perspective). This means systematically examining measures and policies and taking into account such possible effects when defining and implementing them.'

Despite the similarities in their general conceptions of gender mainstreaming, there are also some differences, particularly with respect to their descriptions of the practice of gender mainstreaming. The EC definition emphasises a particular policy technique – namely, the examination and evaluation of the impact of policies on women and men at different stages of the policy making process. In contrast to this, the Council of Europe definition places much more emphasis on the need to transform the policy making process itself.

4. CONCEPTUAL AND THEORETICAL ROOTS OF GENDER MAINSTREAMING

According to Sonia Mazey (2000) gender mainstreaming can be seen as a coming together of second-wave feminism and public policy analysis. As a result of this merging of different theories and analytic frameworks, the theoretical roots of gender mainstreaming are quite diverse - ranging from feminist critiques of liberal democracy to feminist accounts of the policy-making process.

Some roots of the gender mainstreaming approach can be identified in feminist critiques of liberal democracy, especially in the argument that the central categories of liberalism are masculine even though they are presented as universal and gender-neutral. According to this critique, the individual values of liberalism are given the gender-neutral attributes of reason, objectivity, autonomy and universality without acknowledging the way in which these are constructed as male. Moreover, these masculine attributes of the liberal individual are given further weight by putting them in direct opposition to the (lesser, inferior) supposedly feminine attributes of emotion, subjectivity, particularity and care. At the basis of those dualistic pairs lies, according to these criticisms, a fundamental separation of the public and private spheres. Thus, the individual in the public sphere is viewed as a disembodied person who is subject to universal rational principles. Further, the legislation and institutions of liberalism must be gender-neutral, so that the fact that individuals in the public sphere are men or women can be regarded as irrelevant. The “exposure” of the assumptions and fundamental values of liberalism by feminists laid the basis for gender mainstreaming, which has the theoretical potential to challenge the supposed neutrality of public policy and policy-making processes and structures.

One of the other important distinctions between liberalism and gender mainstreaming is in the treatment of equality. The conception of equality in liberal thinking focuses on formal rather than substantive equality and on equality of treatment rather than equality of outcome. One of the main criticisms of liberal conceptions of gender equality is that it is constructed in direct opposition to the concept of gender difference so that the two are regarded as mutually exclusive. In policy terms, this means that the objective of gender equality policy is to

eliminate gender difference. The gender mainstreaming approach is often cited as embracing a better, broader, and more developed concept of equality than other policy approaches to gender issues such as equal treatment. Thus, in the Council of Europe report on gender mainstreaming the concept of equality put forward is one that acknowledges, and responds to, differences between men and women (1998, p.7):

“Gender equality means an equal visibility, empowerment and participation of both sexes in all spheres of public and private life. Gender equality is the opposite of gender inequality, not of gender difference, and aims to promote the full participation of women and men in society.”

Besides second wave feminism criticisms of liberal theory, other important theoretical roots to gender mainstreaming include feminist approaches to public policy analysis based on constructivist theory. According to these approaches, deeply embedded assumptions about gender roles and relationships are reproduced and reinforced by public policy thus giving rise to policy paradigms. Such policy paradigms not only define the content of policies but also the way that policy problems are constructed.

Gender mainstreaming approaches have also benefited by analyses of the policy-making process based on new “institutionalist” approaches. According to these approaches, policy paradigms are rooted in institutions, so that a change in policy paradigm requires not only a change in the content of policies but also a change or re-structuring of the institutional framework.

5. GENDER MAINSTREAMING INSTRUMENTS

The requirement to integrate gender equality (or at least gender or women’s issues) into public policy and programmes has focused attention on how this can be accomplished in practice. Strategies for gender mainstreaming have been developed by leading international institutions (UN bodies, The World Bank, The Council of Europe, European Commission). While these have some common components, they also differ in some key respects, reflecting in particular the conceptual and theoretical differences highlighted above.

The Council of Europe (1998) specifies a number of necessary conditions for gender mainstreaming:

- political will and commitment;
- specific gender equality policies;
- statistics;
- detailed knowledge of gender roles and relations;
- understanding of administrations and administrative systems;
- human and financial resources; and
- participation of women in public and political life, and in decision-making.

The European Commission’s method for the achievement of gender mainstreaming involves a dual approach, combining “gender mainstreaming” (the integration of the gender dimension in all policies and programmes and throughout their cycle, including in all instruments, such as data, monitoring and evaluation) with specific actions targeted at eliminating biases and reducing inequalities. The key components of the EC’s strategy are:

- The systematic use of gender impact assessments and gender proofing;
- Mobilising all Commission services in support of gender mainstreaming;

- Anchoring responsibility for gender within the institution;
- Training and awareness-raising among key personnel;
- Monitoring, benchmarking and breakdown of data and statistics by sex;
- The establishment of co-ordination structures at various levels: the Group of Commissioners on Equal Opportunities; the Inter-service Group on Gender Equality within the Commission services; and the Advisory Committee on Equal Opportunities for women and men involving representatives from the Member States and civil society organisations.

More recently, gender balance on committees and expert groups (EC 2000a) as well as annual work plans have been added as components of the EC strategy. Gender budgeting is emerging as another key element.

On similar lines, the recommendations of the UN Economic and Social Council (1997) on how to mainstream gender in the UN system include the following actions:

- The formulation of specific mainstreaming strategies for sectoral areas;
- The use of institutional directives rather than discretionary guidelines for gender mainstreaming;
- The improvement of tools for gender mainstreaming, such as gender analysis, the use of data disaggregated by sex and age and sector-specific gender surveys, as well as gender-sensitive studies, guidelines and checklists for programming;
- The establishment of instruments and mechanisms for monitoring and evaluation, such as gender-impact analysis methodologies, and the creation of accountability mechanisms for gender mainstreaming;
- Strengthening of the network of gender units/focal points in all policy-making and programmes and support at the most senior management and decision-making levels;
- Capacity-building, including integration of a gender perspective into all training programmes, provision of gender training for all staff and use of specialised gender expertise.

Gender balance amongst staff is also stated as a central goal in the framework of the UN's gender mainstreaming, thus making an explicit link – generally absent in the EC's approach – between gender equality within the institution and the integration of gender equality in policy and programmes.

While training and awareness-raising are mentioned in the EC and UN strategies, specific actions to review and change institutional culture, priorities and practices are absent. In practice, the emphasis has been primarily on the development of instruments (data, impact assessment, etc.) and on institutional structures of support and co-ordination (groups, committees, units, desks and focal points). For the moment, the agenda is “integrationist” – taking gender equality “into account” in policies and programmes – rather than transformative.

In this respect, it is interesting that The World Bank's strategy for “Engendering Development” (2001) – which, while taking a predominantly utilitarian approach to gender equality, has become very influential in the domain of development co-operation – constructs a very clear argument for “institutional reform that promotes gender equality”. This includes reforms of customs, social norms and implicit codes of conduct, as well as of formal structures such as laws, regulations and institutions. The World Bank's strategy argues that gender structures (and inequalities) are “embedded” in social, legal and economic institutions, which in turn establish the incentives, opportunities and constraints that determine women's

and men's choices and actions. Because so many gender inequalities arise from the decisions of these institutions, a fundamental first step in any strategy for gender equality is to "transform legal and regulatory frameworks, markets and organizations into institutions based on the principles of equal rights, equal opportunity and equal voice for women and men" (2001, p.107).

A rapid survey of the three most widely-used instruments for mainstreaming gender in policy is useful here.

a) Gender impact assessment

One of the most widely adopted instruments for gender mainstreaming in policies and programmes is gender impact assessment. This is an ex-ante evaluation of the policy's or programme's likely impact on gender equality, taking into account differences between women and men, or girls and boys, which should be conducted prior to the finalisation and approval of a policy or programme. Bodies such as the Development Assistance Committee (DAC) of the OECD as well as UN agencies had developed impact assessment instruments prior to the introduction of the gender mainstreaming approach; these early instruments, which followed the WID (Women in Development) approach, were revised, following Beijing, to take account of the gender approach. The work of Mieke Verloo, Chair of the Group of Specialists on Mainstreaming of the Council of Europe, has been a major influence on EC approaches to gender impact assessment (Council of Europe 1998; EC 1997; Verloo and Roggeband 1995). Once it has been established if gender is relevant (i.e. if the policy affects a population and if there are differences between women and men in the field/s concerned), the policy should be assessed for its likely differential impact on women and men, or girls and boys, and for its potential contribution to gender equality. Gender impact assessment should be carried out at an early stage of the decision-making process to allow for changes, and even major re-orientations, of policies as appropriate.

There are reasons for being very attentive to the actual use of gender impact assessment as a tool for improving policy formulation: is it undertaken at a sufficiently early stage in the process to influence decisions adequately?; who undertakes the assessment and with what analytical tools, data and information?; are the results taken into account in subsequent revisions of the policy or is it merely a formalistic and technical exercise to pass to the next stage in the policy process?

Interestingly, the Government of Canada, which is amongst the leading national governments in respect of gender mainstreaming, talks not of gender impact assessment by "gender-based analysis". A Guide, produced by the Gender Analysis and Policy Directorate within Human Resources Development Canada, presents the "steps to incorporating gender considerations into policy development and analysis" (HRDC 1997), thus placing emphasis on influencing policy development rather than merely assessing it.

b) Sex-disaggregated data and gender-sensitive indicators

Assessing the likely impact of policies on the situations of women and men, and on improved gender equality, requires good data and information. One of the principal demands expressed within European and international policies on gender mainstreaming is for considerably improved data and information, especially systematic disaggregation of data and information by sex (correlated with other socio-economic variables) and the use of "gender-sensitive" indicators, allowing measurement of changes in the relative situations of, and disparities between, women and men. The International Labour Organisation (ILO) and Statistics Sweden (Hedman et al. 1996) have been major influences on the identification of appropriate

data and information and the development of systems of collection and treatment, the former particularly in the field of labour statistics.

An important observation highlighted by the work on data and statistics, on women prior to 1995 and concerning gender since 1995, is that more is required than simply disaggregating existing data and information by sex. Breaking down conventional units of analysis – particularly the household – by sex has been noted to be crucial. Very early on, the significance of the unequal sharing of unpaid work between women and men, and the failure to capture this in conventional data, was noted by analysts and researchers. As a consequence, the issue of time, particularly in the context of policies on work and public service provision, has been raised strongly at European level since the early 1990s (EUI 1994-5; EC 1998). From 2002, time-use statistics being collected throughout Europe should enable governments to assess the effects of any measures on men's and women's use of time (Himmelweit 2001, p10).

c) Gender budgeting

Even prior to Beijing, UN conferences on women's rights had established the relationship between gender, power, decision-making and the allocation of resources. Since the early 1990s, and in particular since 1995, there have been initiatives to assess national budgets, including taxation proposals and spending plans, from a gender perspective. Australia was the first to take the lead in the early 1990s, which subsequently influenced initiatives in South Africa, Tanzania and other Commonwealth countries, as well as South American countries such as Mexico (UNDP 1999). At the same time monitoring of public budgets by NGOs representing women's interests was taking off in many countries.

Various methodological approaches to incorporate gender into planning and budgeting have been developed (Sharp, Allen and Budlender 2000), including:

- conducting opinion polls and surveys amongst beneficiaries of government spending about their priorities and how far spending meets these;
- expenditure incidence analysis of public expenditure by comparing the distribution of benefits among women, men, girls and boys;
- revenue incidence analysis to calculate how taxes or user charges affect different categories of household or individuals;
- analysis of the impact of government spending on the time use of women and men;
- disaggregating sex variables into medium-term expenditure framework or introducing new variables to represent the unpaid care economy.

Gender budget analysis is a potentially powerful tool for tracking how policy commitments on gender equality are being met in practice, but this too requires sex-disaggregated data and analysis of unpaid and unrecorded work.

6. CRITICISMS OF GENDER MAINSTREAMING

A number of feminist researchers have argued 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 (Charkiewicz 2001; Duncan 1996; Runyan 1999). 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.

One of the principal criticisms of gender mainstreaming stems from the fear that either specific policies on behalf of women will be discontinued, or that specific institutional structures for equal opportunities will be weakened in the name of mainstreaming. In her assessment of the implementation of gender mainstreaming in the Netherlands, Mieke Verloo (2001, p.8) argues that the early implementation of this approach had the negative consequence that all gender equality offices were closed. Because gender mainstreaming mandated the integration of a gender equality perspective everywhere, gender equality was regarded as being the responsibility of everyone rather than being limited to a special equality unit.

Another criticism of gender mainstreaming is that many of the initiatives taken under its mandate fail to create legally enforceable rights (such as Article 119 on equal pay), relying instead on administrative procedures and soft law proclamations that will be implemented unevenly across the Union (Pollack and Hafner-Burton 2000, p.452). In relation to this criticism, Jo Shaw (2001, p.5) raises a number of questions about the relation between gender mainstreaming and other legal and constitutional principles such as non-discrimination and equality:

- how does gender mainstreaming map onto established debates about the relationship between formal and substantive equality?
- if the legal frameworks of gender mainstreaming are, on average, 'softer' and more generalist, what does this mean?
- will gender mainstreaming imply, in the long term, a watering down of already relatively weak equality concepts enshrined in the existing equality directives, or might it imply a strengthening of these concepts, at least in terms of substantive meaning, but a consequential weakening of enforcement and structures of enforceability?

In their analysis of the smooth and generally rapid adoption of gender mainstreaming by the EU, Pollack and Hafner-Burton (2000, p.435) argue that the acceptance and implementation of the strategy depends on the resonance between the proposed policy frame and the dominant frame(s) of the EU institutions, which can be placed along a continuum in terms of their support for either a neo-liberal frame (emphasising individualism and free markets) or a more interventionist frame, which endorses intervention of states and international organisations in the market place in pursuit of social goals such as sexual equality. On this point, Shaw (2001, p.5) questions whether gender mainstreaming ever left behind the neo-liberal context in which it originates (i.e., organisations such as the World Bank, the European Commission, etc) where it can easily be constructed as an economic imperative, promoting strong economies, competitiveness and growth, and acting as an aid to social cohesion.

A fourth criticism, voiced by both Shaw (2001, p.5) and Verloo (2001, p.13-14), is that gender mainstreaming may detract from a better understanding of the policy problem because it suggests that the gender issues which are raised are relatively tractable rather than intractable. For example, issues about gender and development should not be assumed to be resolved because the boxes on the gender checklist have all been ticked off. According to Verloo the view that gender mainstreaming is a simple technical process stems from the assumption that gender is a simple, tractable problem, or that gender studies can provide a final analysis of the problem, and then action can follow. In her view, this understanding derives from a technocratic perspective in policymaking – a perspective that denies the political character of the gender problematic, reducing it to a simple technical one.

7. INTERNATIONAL AND EUROPEAN POLICIES ON GENDER AND INCOME DISTRIBUTION

7.1 Gender issues in income distribution

In the EU on average, women earn a quarter less than men (EC 1999; Rice 1999). According to data from Eurostat, the average gross hourly pay of women is 76.3% of that of men (Eurostat 2000). Seventy-seven per cent of employees on low wages are women. The gap in earnings continues to be substantial, in spite of policies on equal pay for work of equal value and on equal opportunities in employment. The gender pay gap has consequences not only for women's economic status and equality, but also for issues such as low pay and poverty in general. Information available under the auspices of the EU National Action Plans on Social Inclusion (NAPSIIncl) suggests that women's risk of poverty is considerably higher than that of men (Draft Joint Report on Social Inclusion, October 2001).

Significant issues for welfare, tax and benefits systems are thrown up by changing gender roles and family structures. The basic assumptions of social protection and security systems in many European countries are challenged by changing gender roles and relations at home and in work (Bussemaker 1997; Cantillon 1998; Daly 2000; Sainsbury 1999). The effects of changes in welfare and tax regimes cannot be understood without a gender perspective.

The increasing participation of women in the labour market and changes in family structure, including family instability, have affected the "match" between social security and social reality. The concept of the traditional family that underlies many social protection systems leads to the exclusion from social protection of "non typical" families. In parallel, the change in social values has called into question the traditional model of family and individual welfare to the extent that it creates discriminatory effects between people in paid work and out of paid work (which has an important gender dimension) and between women and men.

Gender is also an important variable in understanding the effects of the changes in income security which have acted to encourage complementary or private forms of insurance and pensions. These new insurance or pensions regimes not only affect public social protection systems but also exclude people without sufficient resources, women being in the majority, because of their concentration in "atypical" or informal employment and their lower earnings and higher incidence of poverty (ILO 2000). Women are more at risk of being excluded from social protection and of having insufficient health and pension coverage.

7.2 International policies

Driven in part by the evidence of marked gender disparities in experiences of poverty, and with particular groups of women (those with little education, single parents, the elderly) at particular risk, income distribution policies have been a particular focus of attention in international policies on gender equality.

The two most significant international commitments concerning women's rights and gender equality – the Beijing Programme of Action and CEDAW (The Convention on the Elimination of All Forms of Discrimination against Women) – both include articles which commit signatory governments to ensure gender equality in income distribution policies, including taxes and social benefits.

Influential at international level, the World Bank, one of the main proponents of a liberal agenda, has nonetheless supported some important research in recent years on gender and social protection systems (Cox Edwards 2001 and Ezemenari, Chaudhury and Owens 2002 among others). It has also developed, as a central part of its overall mission of poverty reduction, a "Social Protection Sector Strategy" based on the concept of social risk

management (World Bank 2000). The Strategy notes that amongst the main sources of risk are some associated with gender (control over household resources, gender violence, discrimination against women), and it argues that “Analysis of social risk management and actions to lower vulnerability must take gender differences into account”, since “gender disparities are not only inequitable but also lead to economically inefficient outcomes” (World Bank 2000, p.27).

Amongst non-European countries, significant variations, even between liberal welfare states, can be identified, with evidence of growing disadvantages (for example in the USA) as well as significant improvements in developing women-friendly pensions policies, as in New Zealand (Ginn et al. 2001). Canada has also made notable steps in assessing the gendered impact of social support and the tax system, including pensions (Sayeed, 2002; Young 2000). Chile’s paradigmatic role in pension reform in less developed countries is also significant, for women’s participation in the private pension scheme is marginally higher than men’s, in contract to the significant gender gap in private pension coverage in development countries (Barrientos 1998). As Ginn (2001) notes, the rapidly-encroaching liberal model of welfare, associated mainly with the USA and UK, gives rise to widening inequality, with women on average faring worse then men.

7.3 European policies on gender equality in social protection

7.3.1 Equal treatment and individualisation of rights

Council Directives on equal treatment for men and women in social security schemes date from the late 1970s (EC 1978; EC 1986). The individualisation of rights is regarded as constituting a qualitative leap in the approach to equality of treatment between women and men in areas of social security and tax reform. The gradual move towards individualised social and fiscal rights envisaged by the EU is regarded as providing a suitable reference framework for orienting public policies (de Villota and Ferrari 2001). However, many mechanisms within the social welfare systems in the EU still have the effect either of excluding a greater number of women than men from social protection, or according them reduced benefits, for example where level of benefits depends on family composition.

7.3.2 European Policy on Social Inclusion

At the European Councils of Lisbon (March 2000), Nice (December 2000) and Stockholm (June 2001), EU Member States made a commitment to reduce poverty and promote social inclusion, as well as strengthen social cohesion, in the European Union between 2001 and 2010.

The European Social Policy Agenda (EC 2000b), agreed in Nice, identifies a number of policy challenges, including low levels of personal income, low employment rates especially of women, an increasingly high dependency ratio and significant weaknesses in qualifications and skills required by the knowledge-based economy. Gender issues and equality are prominent in the Social Policy Agenda. Among the objectives and actions of the Social Policy Agenda are:

- the knowledge-based economy, including the participation of women;
- modernising and improving social protection;
- promoting social inclusion;
- promoting gender equality;
- fundamental rights and discrimination;

- life-long learning strategy;
- gender equality within preparation for enlargement.

Moreover, gender mainstreaming is clearly stated in the objectives of the Social Policy Agenda: “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”. Also of importance in the Agenda is the elaboration of statistics, indicators and benchmarks for follow-up and monitoring.

As part of the implementation of the commitments to promote social inclusion, the Council developed common objectives, which have been taken forward by Member States since 2001 through two-year National Action Plans against poverty and social exclusion (NAPs/incl). Eight “core” challenges are tackled by the NAPs/incl, covering employment rights and opportunities for all, adequate incomes and resources to live in human dignity, educational disadvantage, family solidarity and the rights of children, good accommodation, equal access to quality services, improved delivery of services, and regenerating areas of multiple disadvantage. Gender mainstreaming is (or should be) treated as a transversal principle across the policy areas addressed by the NAPs/incl. The assessment of the gender dimension in the first series of NAPs/incl shows mixed treatment of the issue between the Member States (EC 2000b).

7.3.3 Gender in pensions policy

A particular focus of EU social protection policy in recent years concerns national pensions strategies, seen in a series of Commission Communications and reports (these are presented as the “Pensions Package” on the EC’s Social Protection Web page www.europa.eu.int/comm/employment_social/soc-prot). As a recent evaluation study of national pensions strategies in the European Union clear demonstrations, current pensions strategies do not ensure an adequate and equitable pension for women (EC 2002a). The gap between women’s and men’s own pensions can be larger than the pay gap. In addition, some provisions, while compensating for gender differences in the labour market, may merely serve to reinforce traditional gender roles. Giving more generous survivors’ benefits or higher allowances and pension credits for bringing up children to women than to men might act as a financial incentive for maintaining traditional gender roles and discourage men from taking career breaks.

A Commission Communication of July 2001 on “Supporting national strategies for safe and sustainable pensions through an integrated approach” observes that many pension scheme rules are based on out-dated assumptions about family and employment patterns and about the roles of men and women in households and on the labour market. Moreover, while Community legislation requires equal treatment of men and women in statutory social security matters, it allows for certain exceptions regarding the pensionable age, survivors’ benefits and pension rights for bringing up children. While EU Member States are in principle committed to achieving full equal treatment in their pensions legislation, some Member States have yet to full ensure it in their various provisions.

One of the objectives of the EU strategy is to review pensions systems “with a view to eliminating discrimination based on sex while addressing the sources of gender-related inequalities in pension entitlements (e.g. career breaks for family reasons, actuarial factors)” (EC 2001). Amongst the measures that are proposed to promote greater gender equality in pension systems are minimum income guarantees, parental leave arrangements and the

development of better professional care childcare (and other care) services rather than providing generous full-time leave allowances.

8. INTERNATIONAL AND EUROPEAN POLICIES ON GENDER AND EDUCATION

8.1 Gender issues in education

Educational equality has long been a central subject in the sociology of education. Most countries seek to reduce gender differences in educational attainment. While major strides have been made in relation to participation and outcomes, there remain significant gender imbalances across subject areas. Although some disadvantages remain for females, under-performance of some males is a growing problem in many countries. However, some countries have demonstrated that gender differences can be successfully addressed. Gender differences remain in the promotion of motivation and interest in different subjects. Females have higher levels of reading literacy everywhere, while males often – but not always - have higher mathematical literacy. Females have made advances in mathematics and sciences, but wide gender gaps remain in science and technology subjects. High performance in educational attainment does not always correlate with gender equality; high gender gaps occur also in high-performing countries (OECD 2001)

In spite of – or perhaps because of – major improvements in the educational performance of girls, one of the hottest contemporary debates concerns the educational achievement of girls and boys. Among some of the explanations of the persistent gender differences are gendered stereotypes in learning and education (pre-school and at school), gendered behaviour of (female and male) teachers, the intersections between sex, class and race, the choice of mixed or single-sex schools and cognitive styles (Francis 2000; Gilbert and Gilbert 1998; Marshall 1997; Mosconi 1998; Salisbury and Riddell 2000).

At undergraduate level, women now constitute half the undergraduate population across the EU. The proportion of women in undergraduate studies has increased in almost all countries. With the exception of Austria, the Netherlands and Germany, women form a majority of undergraduates (Ackers nd). In most cases, the areas in which women are best represented are the arts, languages and vocational courses such as education. Women are generally well represented at undergraduate level in the sciences as a whole and particularly in the new and more applied and expanding areas of science, including health-related studies and subjects linked to medicine. Women are generally under-represented in areas such as mathematics, technology, physics and engineering. Marked differences between countries exist. Fewer women study sciences in Sweden, and many more in the southern European countries. Women in Portugal and Italy are very well represented in areas such as mathematics, architecture and chemistry. Engineering is the discipline in which women are the worst represented, although women in Portugal achieve a participation rate of 22% in this discipline, more than double that in Germany and Sweden.

The gender gap in the hard and applied sciences, maths and information technology has been a particular focus of attention, both in educational research and policy (Burton 1991; Henwood 2000). Explanations identify attitudinal, social and structural factors. Recent research shows that gender bias lies in the educational system and its teaching practices, not in any inherent physical or intellectual barriers on the part of girls or women. Important foci for change are now regarded as curriculum and assessment practices, classroom and school cultures and teacher education programmes (Davis 1996).

Data on the representation of women at doctoral level indicate a significant “fall-out” in all countries. Women are not making the transition from undergraduate and taught postgraduate programmes to doctoral research in the same proportions as their male peers.

Representation at doctoral level varies according to discipline. In all countries, women are better represented amongst doctoral students in medicine, the life sciences, biology and, to some extent, chemistry and pharmacy. In other areas of science, including physics and mathematics, the lowest levels of representation are found in Nordic countries and the highest levels in southern Europe, where disciplines such as mathematics, chemistry and life sciences are relatively highly feminised. Technology and engineering stand out as areas in which women are worst represented, although representation is higher in southern Europe and lowest in the Nordic countries (ETAN 2000).

8.2 International policies

Somewhat surprisingly, given the prominence of education within international policies on gender equality, the leading international agencies that address education issues – most prominently UNESCO and OECD – do not provide strong leadership on policies concerning gender equality in education, other than in the context of development policy and strategies. Nonetheless, initiatives by the Organisation for Economic Co-operation and Development (OECD) on knowledge and skills in general have highlighted gender gaps, and influenced attention to gender differences in national monitoring and policy.

The OECD’s work on comparative educational indicators and data has been particularly influential, especially the Programme for International Student Assessment (PISA) and International Indicators of Education Systems project (INES). The disaggregation of indicators and data has allowed measurement of gender difference, and has *inter alia* demonstrated that gender equality and high educational attainment overall are not necessarily correlated (OECD 2001).

In line with other UN and international agencies, UNESCO has a clear policy on women’s empowerment and gender equality. It is expected “to play a major role in advocating and affirming women’s rights, and gender rights more broadly, through its work in education, science and social and human sciences, culture and communication.” (UNESCO 1995, 2000). UNESCO’s five critical areas of concern are: equal access to education for women and girls; women’s contribution to peace; women’s access to the media, and their image in the media; women’s contribution to the management of natural resources and environmental protection; the girl-child with regard to access to education and literacy.

UNESCO’s three-pronged approach to women’s empowerment and gender equality consists of: mainstreaming a gender perspective in all policy-planning, programming, implementation and evaluation activities; promoting the participation of women at all levels and fields of activity; and developing specific programmes and activities for the benefit of girls and women. While many of UNESCO’s activities are focused on developing countries, it has been successful in raising issues such as girls’ and women’s access to science education, for example at the 1999 World Conference on Science, which requested, among others, that “new curricula, teaching methodologies and resources taking into account gender and cultural diversity should be developed by national education systems”. UNESCO’s Women in Higher Education Management programme also plays a role in policy developments at international level.

8.3 European policies

In the EU the organisation of education and training systems and the content of learning programmes are the responsibility of the Member States, or their constituent regions. In accordance with the principle of subsidiarity, the EU may support and complement national actions in certain areas of education and training; these include actions concerning the mobility of students and teachers, inter-institutional co-operation, language training, recognition of qualifications and open and distance learning).

Early in the 1980s initiatives were taken by the EU to promote gender equality in education, for example through an action programme on equal opportunities for girls and boys in education (EC 1985) and through equal opportunities initiatives within the Erasmus, Leonardo, Socrates and Youth programmes. While gender equality has been recognised as important within EU programmes on education and vocational training, the planned evaluations of these initiatives remain to be undertaken. Assessing the programmes and initiatives from a gender perspective, Teresa Rees (1998) observes that the already gendered nature of these fields is not incorporated into the analysis upon which the policy is based. As a result, there has been only partial “tinkering” with education and training policies, rather than a more fundamental adaptation of policies to ensure that the sources of inequality are tackled.

Attention to gender within current EU education policy reflects the high political priority placed on the entry of women into the labour market and, in particular, on the improvement of science and technology skills. The work programme on the future objectives of education and training systems in Europe is placed firmly within the framework of the strategic target for 2010, established at the Lisbon European Council meeting of March 2000: “To become the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion” (EC 2002b).

Gender equality is mentioned only in very specific contexts within this work programme, most clearly in relation to increasing recruitment to scientific and technical studies (a “key issue” is improving gender balance among people learning mathematics, science and technology). It also appears under a heading of “supporting active citizenship, equal opportunities and social cohesion”, but even here the key issue is “gender equality in tertiary education and continuous training”. The gender agenda within EU education policy is very narrow indeed, appearing to be uniquely utilitarian, with improved gender “balance” merely serving the policy objectives of a competitive and knowledge-based economy. Rees’ critical analysis of earlier EU policy on education and training may apply equally well to current policy.

The requirement to mainstream gender in all EU policies and programmes appears not to have been met in the current work programme. Indeed, the European Council’s 2001 report on “The concrete future objectives of education and training systems” suggests a conceptual change, with “equal opportunities” linked to the creation of an “inclusive society” by removing discrimination and paying special regard to “vulnerable” groups such as people with special educational needs. The specific nature of gender in/equality is not addressed.

The most visible initiative by the European Union in the field of gender and education is the “Women and Science” programme of DG Research, which is aimed at promoting gender equality in science and research. In 1999, the European Commission adopted a Communication on “Women and Science: mobilising women to enrich European research”, which presented the measures to be taken by the Commission in order to take the gender dimension into account within its research policy. Raising awareness about the gender gap in science and research, and influencing national policies are key parts of the Women and Science strategy.

Activities have included the production and dissemination of an influential report on women in science by an Expert Working Group (ETAN 2000) and the creation of a network of civil servants from the EU and candidate countries (the “Helsinki Group”) to compile information and share experiences. Work on sex-disaggregated statistics and gender-sensitive indicators is also an important element of the strategy. Gender mainstreaming has been adopted as an approach within the Sixth Framework Programme, influenced by gender impact assessments of Specific Programmes of the Fifth Framework Programme (available on the Women and Science Web page: www.cordis.lu/rtd2002/science-society/women.htm).

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**EQUAPOL: Gender-Sensitive and Women-Friendly Public Policies: a
Comparative Analysis of their Progress and Impact**

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BELGIUM: STATE OF THE ART REPORT
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Robert Plasman

and

Salimata Sissoko

DULBEA

Université Libre de Bruxelles

Belgium

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1. NATIONAL POLICY FRAMEWORK ON GENDER EQUALITY AND GENDER MAINSTREAMING

1.1 General background

Following four reforms (1970, 1980, 1988-1989 and 1993), the Belgian state became a federal state. It is made up of 3 cultural communities (Flemish, French-speaking and German-speaking) and 3 regions (Brussels, Flanders and the Walloon region), each endowed with their own powers and responsibilities. To date, only the Flemish Government has a Minister for Equal opportunities (since 1995). At the central level, the Ministry of Employment and Labour is in charge of the policy for equal opportunities (since 1985).

The equal opportunities were added, at the central level, to the policy agenda in Belgium with the creation of the State Secretary of Social Emancipation.

Since 1985, equal opportunities policies for men and women have been developed in four main areas: (a) participation of women in policy-making, (b) a local policy of emancipation, (c) integration of women into socio-economic life, (d) measures to combat violence against women and children.

In the framework of this study, we will focus on the three first areas of Belgium's equal opportunities policy.

1.1.1 *Equal representativeness in policy*

Since 1988 the issue of women's participation in policymaking has been a key aspect of the policy of EQUAL OPPORTUNITIES at the national level. At that time the strategy adopted was based on (1) public-awareness campaigns based on the *Charter of women in policy*¹, (2) research activities (Vogel-Polsky 1995, Gubin et Van Molle 1998 et Gesquière, Jacques et Marissal 1994), and (3) support or organisation of symposiums (e.g. within the framework of the 50th anniversary of women's right to vote).

Having observed the insufficiency of this strategy, the government adopted the law on advisory bodies (1990) and the law on quotas for electoral lists (1994). At this stage, we observe that the willingness or ability of the government to create parity in policy is limited. Indeed, the 1990 law on advisory bodies is merely an incentive measure concerning women's access to advisory bodies. Similarly, the Smet-Tobback law of 1994 on quotas for electoral lists merely made it compulsory that women make up at least one-third of all candidates on party lists at all electoral levels (local to European). Finally, the 1997 law reinforced that of 1990 by imposing that advisory bodies should be composed of a maximum of 2/3rds of people of the same sex.

¹ Charter on women's policy (1988) is composed of ten appeals aimed at encouraging each authority at its own level to take actions against the unequal involvement of women in society.

1.1.2 First Attempt at Mainstreaming at local level

In 1988, the State secretary for female emancipation introduced a programme for an emancipation policy at the local level. This policy aimed at integrating the gender dimension in all fields of local life, i.e. mainstreaming at the local level.

The network of provincial collaborators, which was introduced by the Royal Decree of 1990 concerning positive actions in the public sector, has encouraged municipalities and Public Centres of Social Assistance (CPAS) to develop policies favouring women. Moreover, for over a year, this network has also controlled the Communities Network and the CPAS, has exchanged experiences with them, and developed actions plans as well as projects at the local level.

During the roll-out of the policy (1992) a system of coordination was implemented in which the key actors were 3 members of the Cabinet of the Minister of Employment and Labour, two expert teams, provincial collaborators and the Civil Service (EQUAL OPPORTUNITIES service). As a result, the set of actors was designated and their respective roles were organised. The members of the Cabinet had to manage the follow-up and steering meetings between staff and experts. The experts were assigned the role of assessing the system, giving advice and training staff in equality issues. Notwithstanding the efforts made, only a minority of communities has witnessed genuine implementation of this mainstreaming approach.

According to Degraef, Zaïd and Kemajou (2000), this meagre result is due to the loss of motivation and the irregularity of the actors at all levels (local, provincial and in the Cabinet).

The decline of the federal process in 1996-1997 coincided with the delegation of local policy to the cultural/linguistic community. In Flanders, the “Social Impulsfonds” (SIF) was created, this large programme of coordinated actions is developing measures to combat social exclusion and poverty in its multi-dimensional aspects. The Flemish local actors involved in this project, found it more appropriate to integrate the policy of gender equality in the framework of the SIF at the regional level. This institution does not exist in the French Community.

1.1.3 Positive actions

During 1986-1996, the policy of equality in the socio-economic field was limited to positive action strategies. The Royal Decree of 1987 primarily invited the private sector to develop positive actions on a voluntary basis. Three years later the 1990 Royal Decree extended this responsibility to public services. Nevertheless, the inventory of positive actions introduced via inter-occupational agreements remained disappointing.

As a result, the government concerned with the implementation of positive actions adopted another approach. It launched the “positive actions” programme involving companies and civil service networks that aim at stimulating and managing the implementation of equal opportunities programmes. Unfortunately, once again the initiative missed its goal.

In 1996, the Minister responsible for equal opportunities decided to develop a wider strategy to take into account the expectations of the business world. She introduced the “human resource strategy” which meant that for the first time a real change was made to policy (concerning the private sector). The government would keep encouraging the introduction of positive actions in collective agreements but would also supply free **made-to-measure advice or targeted training to companies in order to introduce the method of the European Foundation for Quality Management (EFQM)**. This process marked a complete change in the way issues of equality are spread with numerous advantages for both companies and the purpose of equality itself. Furthermore, the Positive Actions Unit was renamed

Employment/Companies Unit and the presentation of the Equality Award in 1997 reflected the recognition of the issue of equal opportunities in the world of business.

On the other hand, as far as public services are concerned, the situation has not evolved significantly, in spite of actions developed by the civil service network and initiatives to raise awareness among the civil service hierarchy about equality issues,.

1.1.4 Equal pay

In 1993, the Belgian presidency of the European Council allowed for the introduction, at the European level, of actions aimed at achieving equal pay as guaranteed by Article 119 of EC directive 75/117/EC. In Belgium, several initiatives have been developed in this field in order to find the most appropriate method to compare occupations from a gender viewpoint, namely by examining pay setting methods.

In 1996, the government negotiated a revision of the occupational classification system with the social partners at the sectoral level as well as the adoption of gender-neutral systems. Finally, the inter-occupational agreement of 1999-2000 marked progress in the sense that the social partners have agreed to review the job classification system in sectors causing inequalities between women and men so that the classification systems generate equal opportunities.

Moreover, the Bill of May 7, 1999 on equality of treatment opened the possibility for the government to oblige social partners (by royal decree if necessary) to revise and to adapt the occupational classification system. In 2001, a five-year project was launched in order to support the revision of occupational classification as negotiated by social partners in the inter-occupational agreement of 1999-2000.

The Belgian presidency of 2002 of the European Council allowed the development of studies on pay inequality and the development of indicators on this topic (including on equal indicators, A. Plasman, R. Plasman et M. Rusinek).

In recent years, a considerable number of gender mainstreaming initiatives were initiated in Belgium, particularly at the federal level and by the Flemish Community. We shall see in more detail below that, at the federal level, the aim was mainly to initiate a plan for equality as well as to set up a mainstreaming unit in 2001. The Flemish Community has, amongst others, a Ministry for Equal Opportunities (1995) that has general competence for mainstreaming policy in all fields of activity and all levels of power (1999) and an administrative "Equal Opportunities Unit" (1994) under the general coordination of a single department: the Ministry of the Flemish Community.

Meulders and Jepsen (2000) draw the attention to the lack of coordination between those responsible for equality at the different levels of power. This shortcoming has been taken into consideration, notably by organising an inter-ministerial conference (2001) bringing together all those responsible for equality at the federal, community and regional level.

1.2 Institutional architecture

In Belgium, there are governmental institutions responsible for the policy of gender equality at different levels (federal, regional, community and provincial).

1.2.1 The federal level

At the federal level there are five key gender equality institutions. These are: the Department of Equal opportunities (SEC); the Institute for Equality between Women and Men (IE), which will soon replace the SEC; the Mainstreaming Unit; the Equal Opportunities Council; and the Advisory Committees on Equal Opportunities of the Parliament.

Presently, the financial and human resources set aside at the federal level for equality policy are the budget and personnel of the SEC and the budget allocated to the Mainstreaming Unit created in 2001. This is a start, but is not yet sufficient to create a real gender dynamic in all policies and actions of the federal government. The participation of women in the decision-making process at the federal level is not yet balanced but is evolving (more women MPs, female members of the Government, etc.).

1.2.1.1 Department of Equal opportunities (SEC)

Since 1989, the Minister of Employment and Labour (META) has powers and responsibility for equal opportunities in Belgium. The SEC was set up in 1993 and succeeded the Commission of Women's Labour (1985). The department consists of three units: the "Employment" Unit, which is in charge of employment policy at the Belgian and European level, which analyses the situation of women in Belgium and develops projects to promote equality that are co-financed by the EC; the "Violence" Unit, which collaborates with the Ministry of Justice on issues concerning violence against women and children; and the "Decision-Making" Unit, which studies women's participation in policy-making and in advisory bodies.

The SEC issues expert opinions on the situation of women. "Equal opportunity" civil servants are represented in the different META departments. Since 2000, the SEC is also represented in all working groups for the elaboration of national action plans (NAP/empl) for employment and action plans to fight exclusion (NAP/incl) as well as those for the evaluation of federal employment policy. It is no longer merely involved in equality as was the case when the NAP/empl was first implemented.

1.2.1.2 Equality Institute (IE)

The IE was launched in 2001 on the initiative of the present Minister of Employment and Labour in charge of equal opportunities policy. This institute will be established during 2003 and will generally monitor respect of equality between men and women and have the ability to take legal action in the event of discrimination based on sex. Furthermore, the institute will develop studies and propose tools in order to provide gender-based statistics; give recommendations to public authorities on questions related to equality; support women's associations; and provide information. The institute will replace the current Department of Equal Opportunities.

1.2.1.3 Mainstreaming Unit

In 2001, the Government adopted a strategic plan for equality put forward by Laurette Onkelinx (Federal Minister for Employment, Labour and Equal Opportunities). In the framework of this plan the Mainstreaming Unit was created. This unit is made up of university experts. Its tasks are to (1) train liaison personnel of executive offices and administration, (2) identify provisions and measures taken in each policy to further equal opportunities with a view to mainstreaming, (3) analyse and evaluate the impact of these measures, make recommendations for continued improvement, (4) disseminate good practices by making sure the implemented action plan is highly visible. It seems that the budget set aside for this unit is not sufficient to instil a real mainstreaming dynamic into federal policies.

1.2.1.4 The Council of Equality between Men and Women (CE)

The CE, introduced in 1993 by the fusion of the Commission of Women's Labour (1974) and the Council of Emancipation (1986), is an advisory body in which different social actors concerned with the policy of equal opportunities are represented. The Council is composed of

52 members, among whom are the Minister of Civil Service, the Minister of Employment and Labour in charge of equal opportunities policies, representatives of the social partners, women's and family organisations and experts. The aim of the Council is to draw up reports, conduct research and propose policy measures in the field of equal opportunities at the request of a Minister, an organisation or on its own initiative.

1.2.1.5 The Federal Parliament

Each house of the Belgian federal parliament has an advisory body regarding equal opportunities between men and women. For the Chamber of Representatives this is the Advisory Committee for Social Emancipation (created in 1987) and for the Senate it is the Committee on Equal Opportunities between Men and Women (created in 1995).

Both committees aim at promoting social emancipation and equal opportunities for men and women. As a result, they give advice on these topics at the request of one of their commissions or on their own initiative.

1.2.2 At the Community level

1.2.2.1 French-speaking Community

As far as the French-speaking Community is concerned, there exists, as is the case at the federal level, a Department of Equal Opportunities and an Advisory Committee in charge of equality issues between men and women (in Parliament).

The Prime Minister of the Community Government is responsible for equal opportunities. He/she should ensure that the gender dimension has actually been considered in the draft bills the Government passes to the Community's parliament. As concerns the participation of women in the decision-making process, a decree promoting the balanced participation of men and women in the advisory bodies was approved by Parliament on July 16 2002.

A. DEPARTMENT OF EQUAL OPPORTUNITIES

Since 1994, the Department of Equal Opportunities has been a department of the Ministry of the French-speaking Community and helps to promote equality within all matters for which the French-speaking Community is competent.

The Department disseminates documents relating to gender mainstreaming among the different general administrations of the Ministry of the French Community as well as among parliamentarians and members of the Community Government.

It includes five full-time employees and has an annual budget of approximately 750,000 EUR, to support bodies working in the field of equality between women and men and to organise its proper activities in this area. It should be noted, however, that this Directorate is in charge of broadly defined equality and not only equality between women and men. The same applies to its budget.

B. THE ADVISORY COMMITTEE IN CHARGE OF EQUALITY BETWEEN MEN AND WOMEN

The Advisory Committee in charge of Equality between Men and Women was created in 1997 within the parliament of the French-speaking Community. It is composed of nine members according to the political representation of the government of the French-speaking Community, political groups ensure that there is a balanced representation of their members.

The Committee gives advice on issues related to equality between men and women at the request of parliament, a standing committee or on its own initiative.

1.2.2.2 Dutch-speaking community

The Flemish government has had a special Minister for Equal Opportunities since 1995.

Since 1999 the Minister has a transversal responsibility (of co-ordination) for mainstreaming in all domains of action and at all levels of power. Moreover, the Ministry of the Flemish Community hosts: the Inter-departmental Commission for Equal Opportunities; the people in charge of emancipation matters in the Flemish Community; and the Department of Law Coordination (education). Furthermore, the Flemish parliament hosts a Commission for Health, Welfare and Equal Opportunities, the Social and Economic Council of Flanders and the Flemish Women's Commission.

The budget set aside for equal opportunities in Flanders amounted to approximately 4.05 million EUR in 2001, three times as much as in 1996. The Flemish part of the National Women's Council (women's association) notes that the general budget for equal opportunities target groups increases yearly, but that the share set aside specifically for equality between women and men diminishes every year. Furthermore, the political scene in Flanders strongly favours a larger participation of women in the decision-making process: three women hold director-general posts in the Ministry of the Flemish community; there are three female Flemish ministers for a total of 10; 20% female parliamentarians; 20% female deputy mayors and 7% female mayors.

A. EQUAL OPPORTUNITIES UNIT

The administrative unit comprises six people, which, according to the unit, is insufficient. This unit is horizontally co-ordinated by a single department: the Ministry of the Flemish Community, for the preparation, execution and evaluation of the policy of equality between women and men. This department developed the database "Pluspunt" (Pluspoint). This is a database on women in management; other areas of decision-making are also looked at. According to a member of the management at Pluspunt, the database does not yet work properly. In order to get the Pluspunt database up and running, and accessible to businesses, adaptations to the database, requiring more funds, would be needed.

B. INTER-DEPARTMENTAL COMMISSION FOR EQUAL OPPORTUNITIES

The Inter-departmental Commission for Equality Opportunities, created in 1996, is composed of representative of all ministries of the Flemish Community. The Commission's task is to improve the collaboration and dialogue between the different ministries.

C. THE COMMISSION FOR HEALTH, WELFARE AND EQUAL OPPORTUNITIES AND THE SOCIAL AND ECONOMIC COUNCIL OF FLANDERS

This Commission of the Flemish Parliament was created in 1999. It is composed of representatives of all parliamentary groups and prepares all decrees that are to be proposed to the Parliament.

D. THE FLEMISH WOMEN'S COMMISSION

The Flemish Women's Commission was created in 1991 and aims to promote women in socio-economic life. It gives opinions and presents studies at the request of the Flemish Parliament or on its own initiative.

1.2.3 At the Regional level

1.2.3.1 The Walloon region

The institutions are the Regional Women's Commission of the Economic and Social Council of Wallonia (an advisory and dialogue body) and the network of Equal Opportunities of the FOREM (Office communautaire et régional de la Formation professionnelle et de l'Emploi pour le region Wallonne), which ensures Equal Opportunities in vocational training in Wallonia. The "equality" mandate in the Walloon region is not a fully-fledged portfolio, but rather a transversal responsibility of the Prime Minister.

The means set aside by the Walloon region for equality policy are specific benefits to finance actions with a view to promote employment and training of women, the equal opportunity network of the FOREM and advisers in the area of equality of the Prime Minister. The participation of women in the decision-making process is limited to one woman in the Walloon Government (the current Minister of Employment and Education). The Walloon Parliament attracts few women.

A. THE ADVISORY COMMITTEE IN CHARGE OF EQUALITY BETWEEN MEN AND WOMEN

The Regional Women's Commission, part of the Economic and Social Council of Wallonia, was created in 1994. The Commission has a joint representation of workers' and employers' representatives besides the representatives of the ministries of the Walloon region. The Commission gives advice on laws and regulations concerning gender equality in all regional matters.

B. EQUAL OPPORTUNITY NETWORK AND UNIT OF THE FOREM

Following institutional reforms (Law of August 8, 1980) assigned to the 3 communities (Flanders, French-speaking and German-speaking) the powers and responsibilities for vocational training and to the 3 regions (Flemish, Walloon and Brussels) the powers and responsibilities for job placement. The FOREM was set up in the Walloon region; it inherited the National Employment Office (ONEM), and an equal opportunity network created in the 1970s. This network presently has about 30 advisers on equality between women and men, spread over the different regions and FOREM services. These advisers provide assistance and guidance in the search for a job and professional career, a kindergarten service "Maisons d'enfants", looking after children of job seekers looking for work or attending training and careers guidance towards non-traditional vocations (computer scientist, children's nurse, etc.).

FOREM intends to create an equality unit. This unit will be entrusted with the effective evaluation of measures applied to further female employment in the Walloon Region (awareness campaign for vocational training in sectors where women are under-represented as well as actions aimed at employers).

In the framework of the European employment programme NOW (New Opportunities for Women) implemented in 1990 and which co-financed national and local initiatives, the FOREM participated in the project "AMPHITRITE", in partnership with Spain and Sardinia. This project led to the training of all members of the equal opportunities network, provided

them with expertise in the area of equality and represents a first step on the road to mainstreaming.

1.2.3.2 The Region of Brussels-Capital

Only recently the region set up an equality service. Before, those responsible did not consider equal opportunities to fall within their sphere of responsibility. At present, two key gender equality institutions exist at the regional level. These are: the Department of Equality between Men and Women of the Ministry of the Region of Brussels-Capital and the Women's Associations Unit

A. DEPARTMENT OF EQUALITY BETWEEN MEN AND WOMEN

Since 2001, the Department of Equality between Men and Women of the Ministry of the Region of Brussels-Capital has been overseeing the implementation of equal opportunities between men and women by actions and information (at the regional level).

B. SERVICE OF WOMEN'S ASSOCIATIONS

At the level of the region of Brussels-Capital, the Women's Associations Unit, part of the Commission of the French-speaking Community of Brussels-Capital, gives advice to the Minister of Culture of Brussels-Capital in matters of subsidy-grants to projects of associations that organise awareness campaigns on women-related topics.

1.2.4 At the provincial level

Each province has its unit for equal opportunities, which takes part, at this level, in actions to promote equal opportunities.

1.3 Methods and procedures for mainstreaming gender into public policies

1.3.1 At the federal level

Following the UN conferences of Nairobi (1985) and Beijing (1995), and influenced by EU policies, a law adopted by the Belgian government on March 6 1996, which aimed at supervising the application of the resolutions of the conference of Beijing. Ever since, the government has been held accountable to the Parliament each year regarding the evolution in women's situation in Belgium.

The transversal character of gender dimension has been recognised. This implies that, with a view to achieving equality, the respective situation, priorities and needs of women and men should be systematically taken into account at all levels of social, political, economic and cultural life.

At the federal level, the mainstreaming tools are the implementation of the Strategic Plan for Equality Affairs, the creation of the Mainstreaming Unit in 2001, work relating to gender budgeting, gender-based indicators and statistics and the efforts undertaken to improve coordination between the different levels of power.

1.3.1.1 The Strategic Plan for Equality Matters

In the framework of this plan, each federal minister has committed him/herself, within the framework of his/her competences, to reach strategic objectives concerning gender equality. One person in each cabinet and a civil servant in each ministry have been designated to ensure follow-up.

1.3.1.2 The Mainstreaming Unit

The Mainstreaming Unit (a unit of university experts) has been established to supervise the process of the Strategic Plan. In a first stage, the unit has trained the designated persons in cabinets and civil service departments in gender mainstreaming matters. Today, the experts help each Ministry in the implementation of its goals.

The strategy of mainstreaming is thus based on (1) the integration of a gender dimension in all different policy fields by the formulation of strategic objectives for each department, (2) a partnership between policymakers (ministers), a group of university experts and a group of coordinators (also university experts), (3) a methodology that proposes to work in two phases, the first phase starts with a diagnosis of the situation and proposes a work plan, the second phase consists of the implementation of the plan and, (4) a transversal aspect of the gender mainstreaming process by the integration of the gender dimension at all policy levels.

1.3.1.3 Statistics, indicators and budgets

The process has also led to the definition of a methodological framework and of tools to assess policies from a gender perspective. A work team on budgeting and on the integration of a gender perspective in the conception, implementation and assessment of the State budget was set up. The availability of gender-based indicators is also an important element for gender mainstreaming. In order to improve statistics, several initiatives have been introduced, such as work teams that provide gender-based statistics in fields such as crime and electoral results or concerned with the adoption at the European level of indicators on pay inequality. The Higher Council on Statistics has been charged with improving the statistical system from a gender perspective.

1.3.1.4. Coordination of policies at all levels

In order to integrate the mainstreaming approach optimally, the Government has called an inter-ministerial conference on equality to coordinate actions taken at different decision-making levels.

1.3.2 At Flemish Community level

1.3.2.1 Gender Impact Assessment

There are no instruments that would permit analysis of gender impact at federal level; only the Flemish community in Belgium has developed that type of tool. The Flemish community has developed various instruments that allow policies to be assessed from a gender perspective. To date, the following instruments have been or are being developed:

- EER (Emancipatieeffectrapportage) was introduced in 1997. It is a questionnaire allowing an analysis of the environment for the application of political decisions; the action plans and decisions can be reviewed from the gender angle. The objectives of the analysis are: (1) to determine if there are inconsistencies between the objectives and the content of the proposition in relation to its specific context; (2) to assess the effects of the proposition on the situation of women and men; (3) if possible to highlight negative effects of the policy proposal and its modification so as to promote equal opportunities
- LEER (Lokale Emancipatieeffectrapportage) was introduced in 1999 as a local community version of the EER, and is an audit instrument for inclusive policy by local authorities.

- MEER (Media Effect Rapportering) is based on research begun in 2001. Thanks to this instrument, various media products will be analysed as to their gender neutrality.
- FBA (Family and Business Audit): this audit instrument is in the development phase. The main objective is to draw up, by means of an integrated approach, a work plan that is emancipationist and favourable to families within enterprises. Due to such an integrated approach, attention will be paid to equality between women and men in the audit instrument.

According to Katrien Bruggeman and Herlindis Moestermans (Council of Flemish Women, NWR 2001), the instruments EER and LEER give priority to representation and social position, which means that success depends on the knowledge of the concept 'gender' and the availability of gender statistics. As both are still in the development phase, the existing instruments only yield few productive results. Furthermore, the objectives are very vaguely formulated, hence difficult to use by a person not specialised in gender investigation. Nonetheless, the first step of the instrument can be applied without being a gender expert. So, even if the user has difficulties applying the second and the third steps, s/he is able to detect eventual gender blindness and false assumptions in the first step. The instrument itself has therefore been designed to stimulate awareness-raising among policy makers: being confronted with an instrument making you look at your own policy proposal from a different angle helps to develop new perspectives.

The instrument is accompanied by a handbook, explaining the aims and concerns behind such a tool, as well as its operation. To shed light on the social position of men and women, different aspects of daily life should be taken into account. The EER treats only the general aspects in this regard; the LEER is more precise.

The two instruments emphasise the gender dimension. Although both indicate that the differences between the sexes overlap with differences linked to socio-economic origin, age, ethnic origin, sexual orientation, etc., these dimensions are no longer, in the analytical part, systematically included in the analysis. The danger lies in the confirmation of the dichotomy between women and men and to compromise the dimension of diversity.

The two instruments pay little attention to mechanisms, sources and power positions. They should indicate where the data might be accessed. Each political measure may trigger a statistical research of a different nature. Thus, the two instruments have a signal function that shows the need for statistical material. Practice shows in general and certainly at the local level, that all statistical material is dispersed in many (communal) administrations.

1.3.2.2 Gender-based statistics

Flanders' administration for forecasts and statistics has a regional databank containing data relating to available statistics in different areas, with a breakdown between men/women and regional Flemish indicators that include, since 1998, a chapter on gender. Moreover, since 2001, a user group of gender-based statistics is working on "equal opportunities indicators". The Equal Opportunities Unit of the Flemish community remarks that it is still in the inventory stage and that basic statistics are insufficient.

1.4 Key non-Governmental actors

In Belgium, the policy on equality between women and men is mainly conducted by the Government. There seems to be a lack of participation of non-governmental organisations in efforts aimed at gender equality. They have mainly an advisory role and are consulted on certain points. Moreover, since 2001 various NGOs have received financial support. The main NGOs are the women's associations and the trade unions.

1.4.1 Women's Associations

The main women's associations in the field of gender equality in Belgium are associations such as Amazone, Sophia and the French and Flemish Women's Council.

Amazone, created in 1995, is a centre supporting women's organisations and favouring exchange of ideas between individuals and groups working on equality between men and women. The centre accommodates French and Flemish women's organisations, several libraries and information centres. These women's associations are, among others, the French and Flemish Women's Council, the Sophia network and the Women's University.

Most non-Governmental organisations in this centre receive subsidies from the State, the Communities and the Regions.

In 2001, Amazone concluded the European project DIGMA (in the framework of the IVth Programme, 1996-2000). DIGMA is a European database for the implementation of gender mainstreaming. It puts at the disposal of the actors and actresses of equal opportunities a methodological inventory of tools and materials, whether European or not, that is available on the subject and may be accessed via the Internet (<http://www.amazone.be>).

In 2002, with the financial support of European Social Structural Funds and of the Flemish Community and the collaboration of the FOREM, Amazone created the data bases Euwedin 1 and 2, which highlight good practices (in terms of integrating the gender dimension) in the area of vocational training for adults.

The **Sophia network** was created in 1989 and is aimed at coordinating feminist studies in Belgium. The network promotes and develops feminist research education, as well as research and teaching about women in Belgium. It wants to show the scientific relevance of such research and training and that it has a role to play in elaborating policies that are favourable towards women.

The **National Women's Council**, created in 1905, is a grouping of female associations (policy, socio-cultural, independent, etc.). The Council works for the equality of opportunities between men and women. Up to 1979 it was composed of two departments, Flemish and French; since then the two communities have become independent.

1.4.2 Trade Unions

Women long played a secondary role in working-class militancy in Belgium (Eliane Gubin and Valérie Piette, 2000). Their militancy mainly developed in sector with a predominantly female workforce before gaining a hold in other sectors. However the national strike of 1966 over equal pay for equal work was a turning-point in the history of female militancy: the event forced trade unions to consider women's place in trade unions, and the need to review forms of militancy.

The principal unions in Belgium are the Confederation of Christian Trade Union (CSC/ACV), the Belgian General Federation of Labour (FGTB/ABVV) and, the Federation of Liberal Trade Unions of Belgium (CGSLB/ACLVB).

In 2002, women remain under-represented in leadership position in Belgian trade unions and among members of employee representative bodies. The reasons most frequently advanced for this state of affairs are family responsibilities and social constraints. In practice, although there is a tendency for the number of women union members to rise, the same cannot be said of their representation on union decision-making bodies.

Women account for 47.6% of the CSC/AVC membership. Their representation falls away as one goes up the hierarchy: for example, of the eight members of staff on the CSC/ACV board which deals with everyday matters, only one is a woman.

In the FGTB/ABVV, women form half of the total membership. However, after the workplace 'social elections' of 2000, they account for 25% of FGTB/ABVV representatives on works councils in the market sector and 49% in the non-market sector. At the very top of the union, only two of the federal secretariat's seven members are women.

The CGSLB/ACLVB estimates that 40% of its members are women. In its national bureau, there are two women and three men, while the president's bureau is made up of the president and three staff members, two of whom are women. Three out of 11 national officers are women, and in local coordination offices three of the 21 full-time regional officials are women (eiro 2003:www.eiro.eurofound.ie).

1.4.2.1 Initiatives in the area of equality: CSC/ACV and FGTB/ABVV

Mainstreaming at the CSC/ACV is applied in an informal and intuitive fashion. The officer in charge of the "union service for women" is present during the discussion on political measures. Her role is to make suggestions and submit proposals to improve the situation of women and ensure that the issue of equality will be considered in the elaboration of political proposals. The role of the union service for women is similar to that of a consultant and adviser with the task to make the CSC aware of the problems women face. There is however no mainstreaming tool and no systematic procedure for an integrated approach.

At the level of the FGTB/ABVV, there are signs of internal awareness of the issue of women and the dimension of the problem: equality is about to become a priority. Presently, however, an integrated approach to equality is nothing but a demand and has not been implemented at the FGTB. The socialist union brought out a brochure focussing on the issue of equality of women ("Equality for Women"). The FGTB, which seems increasingly interested in this issue, has not yet implemented gender mainstreaming in the elaboration of its labour policy analysis. Talks have been initiated, but nothing has been done so far.

1.5 Barriers and facilitators to gender mainstreaming

1.5.1 Barriers

There are three identifiable barriers to gender mainstreaming in Belgium. The first relates to the lack of gender-specific data, necessary to follow the impact of measures being taken. The Federal government proposes to develop sex-disaggregated statistics; however a single splitting of existing data by sex is not sufficient for efficient gender mainstreaming. The data on women are often inappropriate. A new type of data and indicator would be necessary as well as further qualitative and panel data. The data relating to the labour market, for example, are built around the masculine model (full-time work, without interruption), the data relating to the composition of the household and lifestyle are difficult to obtain, one notes the predominance of cross-section data (as compared to panel data) and the level of aggregation sometimes renders analysis of occupational segregation impossible.

A second barrier to gender mainstreaming seems to be the federal state's lack of initiative in this area. Measures were taken recently, mostly at the instigation of international bodies (United Nations and European Union). Particularly, the European strategy for employment and the Directive on gender mainstreaming represent a facilitator for its promotion in Belgium.

A third barrier to gender mainstreaming in Belgium was the absence of co-operation between, on the one hand, the different levels of government (regional, community and federal levels) and, on the other hand, the bodies dealing with equality and with so-called "general" employment policies. This was acting as a brake to the implementation of a coherent

mainstreaming policy. This has been recognised and much work has been done to improve collaboration such as, for instance, the Inter-ministerial conference on equality that took place in 2001.

1.5.2 Facilitators

We can identify three facilitators of gender mainstreaming in Belgium. First of all, decentralisation made it possible, especially in Flanders, to develop certain initiatives in the area of gender mainstreaming and positive actions that are lacking at the level of the federal state and the other federated entities. This is so-called practice in the heart of Belgium.

A second facilitator is the influence of international bodies (United Nations and European Union) on equal opportunities and mainstreaming policies developed at the level of the federal state. Thus, the European strategy for employment and the Directive on equality between women and men and gender mainstreaming is a facilitator for their promotion in Belgium. Before that, the federal government seemed to lack initiative in this area.

Furthermore, it seems that nowadays gender mainstreaming has been granted a higher priority on the policy agenda. As a result, the mainstreaming project that was developed in 2001 is now being implemented and it seems to form a basis for real integration of the gender dimension in all fields.

2 GENDER EQUALITY AND GENDER MAINSTREAMING IN SOCIAL PROTECTION AND TAX POLICIES

The welfare and taxation system in Belgium is highly centralised. Belgium is currently embarking on the individualisation of its fiscal and social security system.

In 2001, a reform of its tax system was adopted which shall enter into force progressively and be fully applicable in 2004. One consequence of the reform will be to neutralise the fiscal system vis-à-vis personal choices (suppression of measures putting married couples at a disadvantage) and will enable couples living together to benefit from the same advantages as married couples. More precisely, as far as lifestyle is concerned, the tax reform eliminates all modulations linked to the family situation. Instead, the new subsidies are uniform which constitutes a very positive element for women who used to benefit from lower subsidies than men.

On the other hand, the social welfare system in Belgium has not yet been individualised. According to Jepsen et al. (1997), the Belgian social security system is, unlike universal systems, a system based on “insurance”. This system is mainly financed by contributions and ties the right to social security as well as the amount of benefits to the characteristics of working life. It also takes into consideration the composition of the household to which the individual belongs to determine the level of social benefits that are or will be due to him/her and makes extensive use of derivative rights. These rights aim to expand social protection to cover persons not engaging in gainful employment; they are based on an existing relationship with a holder of direct rights: this relationship may be parental, marital or non-marital union.

Non-individualised social rights are known to have a negative impact on women’s participation in the labour market. Women in Belgium risk getting caught in an unemployment trap through two distinct non-individualised measures. The first one is linked to the social security system that links the right to unemployment benefits and their amount to the family and the status of the cohabitant; the second one lies in the taxation system providing a deduction for a dependent spouse (Meulders and Jepsen, 2000).

2.1 Treatment of gender in policy content

The recent measures with respect to social protection and tax policy have been undertaken in the framework of the NAP/empl and the NAP/incl. They encourage employment, in particular for low paid workers, by reductions of social security contributions, tax measures and increased allowances but they also improve the social protection system.

2.1.1 Reduction of social security contributions

In Belgium, the financing of the social security system as well as the tax system imposes a particularly heavy burden on wages. Since 1999, the government has been working on a tax reform in order to reach, over a period of 6 years, a level of employees' contributions that is comparable to neighbouring countriesⁱ. The measures implemented either cover all workers or are focused on low wages only.

The new system of reductions in social security contributions ("structural measure") that has been in place since 1999 consists in a standard reduction of employers' social contributions for all workers combined with an additional reduction for low wages.

In January 2000, new rules for the social security contributions of low wage earners were introduced. Although the reduced social security contributions (of employees and employers) encourage the participation of poorly paid workers and reduce labour costs in general, they are likely to damage the situation of women as compared to men. Indeed, low paid employment (low skilled and part-time jobs) mainly concerns women. By promoting this kind of employment, policymakers thus risk reinforcing women's participation in the labour market at the low-income level.

Moreover, as far as social protection is concerned, the agreement between the federal State and the federate authorities of October 2001 stipulates that the social protection system be extended to include child minders as of April 2003.

Indeed before this they only benefited from derived rights from their spouse and nothing at all if they lived alone.

Concerning the gender impact assessment of employment policies a project co-financed by the Belgian Ministry of Employment and Labour and the European Social Fund and carried out by the Dulbea, JOB+ (2000), shows that:

- systems favouring women are granted the most important financial means which implies that the government seems to give priority to projects that improve the situation of women on the labour market,
- the selective character of the measures influences their effect (favourable, discriminating) on men and women and that it is therefore important to mainstream the process, and
- the computation of reductions in social contributions is hazardous: hence, lump-sum reductions should be encouraged, especially since they are to the advantage of low paid workers.

2.1.2 Modifications of the tax system

Firstly, the tax reform 2001 introduces neutrality towards personal lifestyle choices by suppressing measures that are unfavourable for married couples and by allowing cohabitants to benefit from advantages that were previously linked to marriage.

Secondly, the tax reform 2001 also reduces the pressure on wages, and in particular on low wages by: (1) the gradual suppression of the additional crisis surcharge, (2) the decrease in the

withholding tax on earnings, (3) the reinforcement of the tax credit on low wages, which causes minimal taxable income to increase, and (4) the modification of the tax brackets, which lowers tax rates on middle incomes.

The introduction of the tax credit on low wages in 2001 was the most innovative measure. It can be seen both as an incentive towards employment and as an instrument in the fight against poverty. Below a given wage level, the tax credit becomes an income supplement. It is thus similar to other negative tax measures such as the Working Families Tax Credit (WFTC) that was introduced in Great Britain.

The tax credit leads to a substantial revaluation of the earnings of workers receiving close to minimum wages or who are employed on a part-time basis. This is commonly the case of women.

Lastly, the expenses for a child between 0-3 years of age have become 100% tax-deductible since 2000, in order to facilitate childcare responsibilities,.

2.1.3 The increase of allowances

The principal measures regarding allowances are:

1. The introduction in 2000 of the mobility bonus and/or the bonus for lone parents for long-term unemployed lone parents who find a job that involves high transport costs. Moreover, the bonus on child benefits is maintained during six months for that group of workers. These measures thus aim at facilitating their transition towards employment.

2. The extension of paternity leave from three to 10 days since 2002, in order to encourage fathers to take care of their children. Furthermore, the adoptive leave was created in 2000 and offers both parents a 10-day leave.

In both cases (paternity and adoptive leave), the employer pays the full wage during the first three days and for the seven days remaining the mutual insurance system covers 82% of the wage (with a maximum of 2 580 euro).

3. In 2001, the government has reformed career breaks: allowances have increased and everyone has been granted the right to *credit-time*.

4. The extension of the learning-leave to part-time workers in 2001.

However, we want to emphasise the fact that although measures that support low wage workers and facilitate the combination of private and working life are aimed at reducing the poverty trap (poverty and disincentive to work), they result in a division of work and a functioning of the labour market that allow numerous inequalities between men and women to persist. In other words, incentives to work and to leave, which are apparently neutral, nevertheless have different effects on women and men.

2.1.4 Retirement

Regarding retirement, the principal measures are:

1. The increase of the minimum level of old-age and survivor's pensions for employees and the self-employed since July 1 2000;

2. The adaptation of old-age pensions and survivors' pensions of employees and the self-employed are adjusted to economic growth since 2002;

3. The federally guaranteed income for old persons (RGP) has changed and become the Guarantee of Resources to old persons (GRP), the minimal age for eligibility is the same for both men and women (65 years of age) and benefits are 6.4% higher than in the old system.

2.2 Institutional architecture and policy-making processes

Social security falls mainly within the powers and responsibilities of the Ministry of Social Affairs and Pensions (social security), the Ministry for Employment and Labour (legislation concerning unemployment and labour law), the Civil Service Ministry (legislation relating to civil servants) and the Finance Ministry (legislation relating to pensions of civil servants and income tax legislation).

Due to the dialogue on the National Action Plan for Social Inclusion, coordination between the governments of the Communities, Regions, the Federal Government and the associations concerned has been enhanced. Poverty requires measures to be taken in various areas falling within the powers and responsibilities of different authorities (revenues, labour, education, health, justice, culture, heritage).

Moreover the Council for Equal Opportunity between Men and Women (Conseil à l'Égalité des Chances entre Homme et Femmes) was set up in 1993 (although it was activated only in 1994). The latter serves as an advisory body for social security issues. Budgetary constraints notwithstanding, it has given advice on the widest range of issues concerning equal opportunities.

Furthermore, in the framework of the National Action Plan for Social Inclusion an inter-ministerial conference for Social Integration was organised as well as a work process mainly involving organisations in which the poor have a say. In 1999, a cooperation agreement between the State, the Communities and the Regions established the Service for the Fight against Poverty, Precariousness and Social Exclusion. This service guarantees the participation of the poorest by means of a permanent dialogue with the organisations concerned. This dialogue enables the most destitute to co-determine the priorities to be put on the agenda and to make recommendations to the responsible authorities.

2.3 Methods and procedures for mainstreaming gender in policies

In 2001, the “**plan stratégique en matière d'égalité des chances**” (mainstreaming strategy), in which each minister committed him/herself to a strategic objective in terms of equality, set up a coherent mainstreaming strategy in all fields.

Within this framework the Minister of Finance initiated the reform of the tax system in order for it to become a completely neutral system with respect to personal lifestyle choices.

The Minister for the Budget, Social Integration and Social Economy committed himself, according to the Lisbon target, to incorporate a gender dimension in all measures taken within the framework of the National Action Plan against poverty.

Indeed, the National Action Plan for Social Inclusion first of all led to the creation of the Service for the Fight against Poverty, Precariousness and Exclusion in 1999. Initially set up in the Centre for Equal Opportunities and the Fight against Racism (in the Prime Minister's services), it shall fall within the competence of the Minister for Social Integration.

Moreover the NAP/incl (2001-2003) contains new measures that are targeted at disadvantaged persons (low paid workers, lone parents, etc). Actions are being developed to improve their insertion on the labour market as well as their social protection. Nevertheless, collaboration between the different authorities remains difficult at times. Of particular importance is the provision of gender-based indicators that allow for monitoring and evaluating the gender impact of measures.

2.4 Key actors involved

At this stage, it is confirmed in the National Action Plan for Social Inclusion that a follow-up and evaluation shall take place with the different actors. In the formulation of the Action Plan relations remained limited to communication, due to time pressure. In the follow-up, a real dialogue should be initiated.

2.5 Barriers and facilitators

Concerning facilitators, the EU directives have largely contributed to the improvement of a system that was recognised to be disadvantageous for women. In fact, the need to increase their participation in the labour market and to make the tax system more employment friendly allowed government and social partners to correct the system. Moreover, the introduction of the Nation Action Plan for Social Inclusion triggered a dialogue at all levels of power on the subject of social exclusion.

In terms of barriers, despite the trends initiated by the introduction of the National Action Plan for Social Inclusion, policy making remains very much centralised in this domain and the fact that the gender issue is still not a priority in regard to the social protection and tax system, certainly explains the slowness of the process. We have seen earlier in this report that decentralisation, among other effects, lent a gender impetus to policy-making and review.

3. GENDER EQUALITY AND GENDER MAINSTREAMING IN EDUCATION POLICIES.

In Belgium the educational system contains three main umbrella organisations or networks: Official Community Education, that is non-confessional; Official Subsidised Education organised by local authorities, and Private Subsidised Education (mainly catholic). Each parent has the choice regarding the education of his/her children between the two systems.

Moreover, as we have seen, within the federal State of Belgium, the three major communities enjoy autonomy on number of important subjects. Since this also applies for education, the structure of study in Dutch and French communities will hardly be identical, although many similarities do still exist. The education system has three levels: fundamental (nursery and primary school), secondary and higher school. In Belgium universities are not the only institutions for higher education. The colleges of higher education organise programmes that also last either three or four to five years.

3.1 Treatment of gender in the policy content

3.1.1 French-speaking Community

The issue of equal opportunities between girls and boys is not directly taken into account in policies on education introduced by the French-speaking Community. Authorities are more active concerning the guarantee of equal opportunities in general for all students. Nevertheless some measures can have positive effects on women's situation.

In 1997, the French-speaking Community adopted the 24th July 1997 decree, which defines the priority missions of fundamental and secondary education and organises the bodies allowing the attainment of these goals. Pilot commissions – one for each level of education – are in charge of coordinating and monitoring the application of these priority missions of education (“the platform of competences”), curricula and series of tests corresponding to the platforms of competences.

The four priorities are: (1) to promote the self-confidence and the development of personality of each student, (2) to help students to learn skills that will allow them to learn throughout their life and take an active part in the economic, cultural and social life, (3) to prepare all students to be responsible citizens, able to take part in the development of a society that is democratic, pluralistic and open to other cultures, and finally, (4) to ensure to all students equal opportunities of emancipation.

These four priorities have strong goals concerning equality in general; the measures taken in order to satisfy these priorities should also concern the gender aspect. In particular, measures that could have an impact on gender equality are those concerning the improvement of the multi-media equipment of primary and secondary schools, the access to Internet and the training of teachers to computer science. This generalisation of the education in new technology at school may increase the representativeness of girls in scientific and technologic career orientations, where they are under-represented.

Improvements have been realised concerning the training of teachers. They concern the adaptation of teachers to fundamental pedagogical reforms, the organisation of courses shared by all teachers, whatever their level of teaching, and the recognition and the subsidy of teacher-training outside working hours.

3.1.2 Flemish Community

In 1992 an action plan, called 'Diversification of study options by girls' was launched in Belgium by the Flemish Education Council in a certain number of pilot schools, to find out what keeps girls from choosing a non-traditional career.

Following the results of this survey, some initiatives have been taken in a series of test schools in order to define a global approach that would encourage girls to opt for industrial sections in technical and professional schools.

This project did not only want to enlarge girls' choices at school, but it also included a number of accompanying measures for those girls, in order to assist them in higher education or on the job market, as well as a support for those schools that participated in the project, for adopting these measures permanently and integrate them into their educational structures. The project was successful. The efforts made enabled schools to offer a wider choice to girls, and allowed the development of a certain number of educational measures to support the entire process. The project ended in 1996. The minister in charge stated that too many girls coming out of the industrial sections had difficulties finding a job. Moreover, it was considered as being too one-sided to push girls into choosing sections dominated by boys. Therefore, reconsidering and restructuring typical female sections was necessary, and proclaiming of male study choices as the standard was denounced by the new political agenda. Recently, efforts have been made to support the selection process and to stimulate deliberate educational choices, based on the conviction of the pupils.

In Flanders, other initiatives have tried to go beyond and draw attention to traditional gender differences, such as an advertising campaign set up by the Secretary of State for Social Emancipation, encouraging girls to widen their choices, and developing a series of educational materials.

The Department of Educational policy coordination was set up in 1995 within the Department of Education of the Flemish ministry. This department gives advice on all policy projects of the ministers responsible of at the different education levels.

3.2 Institutional architecture and policy-making processes

The main policy actors concerning education are community government but also trade unions and all advisory bodies of different levels of education.

The participation at the central level is ensured by the **Flemish Council of Education** and the **Council of Education and Training** in the French-speaking Community, which have both been created in 1990.

In particular, the Council of Education and Training aims to promote education and training. The Council is a meeting and collaboration body between these two aspects and gives advice on all fields concerning these topics.

The Council has already given advice concerning equal opportunities between boys and girls, men and women. For instance opinion no. 65 (Council of Education and Training, 1999) points out differences between boys and girls in terms of success, careers guidance and career paths and made proposals concerning coeducational system, career orientations. More recently, there have been opinions on careers guidance (2002) and on continuous training (2000).

Within the Department of Education of the Flemish Ministry, the Department of Educational Policy Coordination has been in existence since 1995. This department gives advice on all policy proposals by the ministers responsible for different levels of education. The Department of Coordination is concerned by the coherence of educational policy; it is composed of two independent commissions that perform assessments according to the principle of the importance of the policy for the first committee and the social content of the policy for the other. The Department pays attention to the impact of measures on the equal opportunities between boys and girls, and women and men, in education, based on gender-based statistics and research.

The **Inter-University Councils**, the VLIR in Flemish Community and CUIF in French-speaking Community, have research and advisory tasks concerning university education.

The mission of the **Councils of Higher Institutes**, the VLHORA in Flemish Community and CGHE in French-speaking Community, concerns the colleges of higher education.

At the local level the participation of all actors is ensured, in the State education system, by the **School Councils** and in the municipality and provincial education, by the **Participation Councils**, which are also dialogue and advisory bodies.

3.3 Methods and procedures for mainstreaming gender in policies

The Flemish Community has implemented a process of mainstreaming through the Department of Educational Policy Coordination. This department pays attention to the impact of measures, based on gender-based statistics and research and make policy proposals.

Concerning the French-speaking Community, the elimination of inequalities between students in general and the promotion of equal opportunities seem to be the priorities of the government. However, actions currently undertaken concerning priority missions of fundamental and secondary education earlier mentioned may have a direct or indirect positive effect on girls' education. Studies have been undertaken to assess the position of women with regard to men in education.

The "Newtonia" study, of the Department of Sociology of the Free University of Brussels (ULB, 2003), analyses the career orientations of the students of the ULB. It confirms social inequalities in university access but also the different career orientations between men and women.

In addition, the study of DULBEA (De Henau and Meulders, 2003) on low representation of women holding higher positions in academic careers shows that the denial of discrimination still persists among men and women faculty, even while they advocate an automatic move to parity. Making a forecast on the basis of the last 12 years' data, the researchers conclude that without changes in structures and processes, we will have to wait 183 years before reaching parity amongst male and female Full Professors.

An action that could bring a wider consideration of the impact of policies on girls or women is perhaps the participation of Belgium (the two communities separately) in the INES (International Indicators on Education) project of the OECD.

In particular, this project has allowed the French-speaking Community to catch up its backlog concerning statistics that can be used in international comparisons of educational systems. Indeed, the community now has analysis tools for its education system, and in addition its statistics service (information on schools) has been reorganised.

Moreover, the participation of Belgium in the PISA (International Program for the follow-up of students experience aged of 15) study by OECD also allows countries involved to develop gender-based statistics, which is the basis for an assessment of the situation of girls in the education field.

The PISA programme involved the study of the abilities of students aged 15 in the OECD. Tests happened during spring 2000 in secondary schools. The three abilities tested were literacy, mathematics and sciences. The results of the PISA study (2000) show, in particular concerning French-speaking Community, that the literacy gap is 35 points in favour of girls, 6 points in favour of boys in mathematics and finally girls have, on average, a score of 7 points higher than boys in sciences.

3.4 Key actors involved

The principal non-governmental actors are the universities in the French and Flemish communities researching the situation of girls at school and in higher education (representation, success, choice of orientation).

In Flanders, centres for gender studies are active at most Flemish Universities (University of Antwerp (UIA), Brussels (VUB), Gent (RUG), Leuven (KULeuven) and Diepenbeek (LUC)). It should be noted that most of the work carried out in these centres is largely of a voluntary nature, i.e. performed by professors on top of their regular duties in higher education and research. These centres recommend, among others, the establishment of an equal opportunities policy in education. There is also an informal network among the university centres of gender studies.

In the French Community, at the University of Louvain (UCL), an interdepartmental group for women's studies exists since 1996 and groups some 70 staff members. Such a group is operative in many French-speaking universities (Liège (Ulg, ULB) and Mons (UMH).

A coordination network of feminist studies exists in Belgium since 1990 (Sophia). This network watches over the different chairs that are organised within or across the universities and of both of Belgium's communities. It publishes a journal and organises conferences and seminars on women's issues.

3.5 Barriers and facilitators

The Flemish Community seems to be more advanced concerning mainstreaming in education policy than the French one. It is the result of a will of the government to eliminate all forms of discrimination and to reach equal opportunities for all. The French-speaking Community also

undertakes measures encouraging equal opportunities but does not place any particular importance on inequalities between boys and girls.

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List of Centres of competence

GOVERNMENTAL INSTITUTIONS:

1. THE FEDERAL LEVEL

Federal Ministry Responsible for equal opportunities between Men and Women
<http://meta.fgov.be/pa/paa/framesetfri00.htm>

The Department of Equal opportunities <http://www.meta.fgov.be/pa/paa/framesetfrcf00.htm>

The Council of Equality between Men and Women :
<http://www.meta.fgov.be>

The Advisory Committee for Social Emancipation
<http://www1.dekamer.be/wwwcfm/deputes/cfm/comm.cfm?lang=F&com=025>

The Committee for Equal opportunities Between Men and Women
http://www.senate.be/www/webdriver?MIval=index_senate&M=5&LANG=fr <http://www.senate.be/>

2. THE REGIONAL AND COMMUNITY LEVEL

The Advisory Committee in charge of Equality between Men and Women
http://www.pcf.be/Commissions/Commissions_Attributions_Com_avis.html

The Regional Women's Commission

The Department of Equal opportunities
<http://www.cfwb.be/egales>

Flemish Ministry Responsible for the Equal opportunities Between Men and Women

<http://www.gelijkekansen.vlaanderen.be/structuren/minister/opdracht.htm> <http://www.gelijkekansen.vlaanderen.be/>

The Inter-departmental Commission for Equal opportunities
<http://www.gelijkekansen.vlaanderen.be/structuren/icgk/doel.htm>

Persons in charge of Emancipation Matters in the Flemish Community
<http://www.gelijkekansen.vlaanderen.be/structuren/emancipatiezaken/opdracht.htm>

Department of Educational Policy Coordination
<http://www.ond.vlaanderen.be>

The Commission for Health, Welfare and Equal opportunities and the Social and Economic Council of Flanders <http://www.vlaamsparlement.be/p3app/htmlpages/vp/index.html>

The Flemish Women's Commission
<http://www.serv.be/>

The Women's Associations Service

The Department of Equality between Men and Women

NON-GOVERNMENTAL INSTITUTIONS:

Amazonie : <http://www.amazonie.be>

The Sophia network : <http://www.sophia.be>

The Flemish National Women's Council : <http://www.vrouwenraad.be>

The French National Women's Council

**EQUAPOL: Gender Sensitive and Women Friendly Public Policies:
A Comparative Analysis of Their Progress and Impact**

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**SPAIN: STATE OF THE ART REPORT
Deliverable Number 1**

Prof. Mary Daly

and

Sara Clavero

School of Sociology and Social Policy

Queen's University, Belfast

Northern Ireland

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1. NATIONAL POLICY FRAMEWORK ON GENDER EQUALITY AND GENDER MAINSTREAMING

1.1 General Background

Most studies on the development of feminism and feminist policies in Spain begin with an overview of the country's particular historical context. For example, Threlfall's (1985; 1997; 1998) research on feminism in Spain shows how gender equality policy as it exists today can be traced back to a long 'incubating' period spanning three distinctive political contexts. The first context is that of a long-lasting authoritarian regime (1939-1975) at the end of which women began to organise themselves within the, then illegal, Communist Party. It has been noted that these women were not particularly interested in feminist issues, but rather in mobilising other women against the Franco regime (Threlfall 1985, pp. 44-45). The second context is that of the transition years (1975-1981) which were marked by fervent political activity. This is a period that witnessed the emergence of an organised feminist grouping within the rising Spanish social democratic party (PSOE). Gradually, this grouping would gain power and influence within the party, succeeding in setting a specific women's agenda. The third context is marked by the rise of the social democratic party to power and its prominence in national, regional and local government for a period of 13 consecutive years (Oct 1982 - March 1996). This is the period in which the most important achievements in the field of gender equality took place. These include: a) the creation of women's equality institutions at central and regional levels of government and b) the introduction and establishment of equality plans as a tool to incorporate a gender equality perspective into different policy areas at all levels of government.

To sum up, political parties of the left - in particular the social democratic party - have played a leading role in the introduction and development of gender equality policy and institutions in Spain. According to one expert (Threlfall 1998), the extent of this influence has been such that Spain should be studied as a case of 'party feminism' rather than one of 'state feminism'.

An important characteristic of gender equality policy in Spain is its high degree of decentralisation. The Spanish Constitution of 1978 established a decentralised model of administration, consisting of seventeen regional governments and parliaments. Between 1988 and 1994, each regional government set up its own gender equality institutions. According to Hernandez and Novo (2002, p. 461) gender equality policy in Spain is more regional than national. This is illustrated, for example, by the differences in the proportion of the total budget spent on gender policies, which is lower in central government than in any of the regional governments (e.g., 0.01% spent by central government compared to 0.43% by the regional administration of Madrid).

1.2 Institutional Architecture

1.2.1 Women's Institute (*Instituto de la Mujer*)

The Women's Institute was set up in 1983, one year after the Spanish social democratic party came to power. Its remit is to promote equality between the sexes and the participation of women in political, cultural, economic and social life. The principal role of the Institute lies in the promotion and coordination of gender equality policies. In practical terms, this means trying to convince more powerful state institutions (ministries) to implement women's equality policies. The main policy instrument used to this end has been the elaboration of

equality plans in collaboration with other state institutions.² However, it is important to point out that the Institute does not have any powers to penalise departments for their failure to implement the plans. Therefore, it is up to the ministries involved to decide whether the measures contained in the plan are to be applied or not.³

The Institute was established not as a ministry but as an autonomous body within a ministry.⁴ It has its own director general, facilities and independent budget. It should be noted, however, that the Institute's 'autonomy' does not mean independence from the political party in office but rather autonomy from ministerial hierarchy.

Despite the limitations of the Institute at the level of policy implementation, a number of authors agree on its important role in influencing policy across different areas and within different government levels (Sensat and Varella 1998, p. 360). This has been achieved through coordination with other central government departments and with other equality institutions at regional and local levels. Thus, cooperation with the different ministries has resulted in the inclusion of the specific objectives of equality policy in general public policies. On the other hand, cooperation with regional and local administrations has given rise to a highly de-centralised model of gender equality policy.

Between 1988 and 1994 regional administrations created their own women's agencies. These agencies carry out functions similar to those undertaken by the national Women's Institute. Like the Institute at the national level, the regional agencies present themselves not as direct executors of policies but as their promoters and coordinators. In other words, their aim is to persuade the other governmental units to assume and develop objectives and activities in order to promote gender equality in their respective areas. However, their precise status, levels of autonomy and remit vary significantly from region to region. According to Threlfall (1996, p. 134; 1998, p. 88) such regional variation in equality policy depends on the political party in government.

Since the right-wing Popular Party came to power in 1996, a number of observers have detected that the political profile of the Institute has significantly diminished. After the 1996 general election the Institute was integrated into a new Ministry of Employment and Social Affairs, which effectively implied a lessening of its former status. Sensat & Varella (1998, p. 360) argue that the new location of the Institute may be a sign of the low priority placed by the party on equality policies. It has also been observed that, in regional governments where the Popular Party has a majority, the profile of women's agencies has been very much lowered by way, for example, of cutting budgets and limiting their existing powers (Hernandez and Novo 2002, p. 468).

1.2.2 Observatory of Equal Opportunities between Women and Men (Observatorio de la Igualdad de Oportunidades entre Mujeres y Hombres)

The creation of an observatory of equal opportunities was first mentioned in the third Plan of Equal Opportunities between Women and Men, 1997-2000 with the objective of promoting research on women and gender. The idea was to set up a body that would provide information on changes in Spanish society in relation to gender inequalities. This information would in

² Since 1985, the Institute's director has been aided by an advisory council, which is primarily composed of representatives from the major ministries. This council has the role of involving ministerial representatives in the formulation, implementation and evaluation of equality policies.

³ As Valiente points out (1997a, p.132) feminists within the social democratic party were successful in the first stages of the policy process (i.e., problem definition and agenda setting) but not in the last stages (i.e., policy formulation and implementation).

⁴ The Institute was located within the Ministry of Culture in 1983, then within the newly created Ministry of Social Affairs in 1988, and in 1996 within the Ministry for Employment and Social Affairs.

turn help in the design future equality policy and in the monitoring and evaluation of current equality policy.

The observatory was finally set up in 2000 within the Ministry of Employment and Social Affairs. It has a remit to monitor and evaluate the impact of policies on women. The observatory is also in charge of building a system of gender equality indicators. The management of the observatory is the responsibility of the Women's Institute. The observatory includes representatives of equal opportunities bodies at both central and regional level, as well as representatives of local government, NGOs, and the National Institute of Statistics. All ministries are also represented.

1.2.3 All-party Parliamentary Committee on Women's Rights (Comisión Parlamentaria Mixta sobre los Derechos de la Mujer)

This is an all-party parliamentary committee involving members of both houses (Congress and Senate). It was set up in 1990, replacing the previous Joint Committee of Equal Opportunities for Women (established in 1988). This is a permanent committee, renewed each time a new parliament is instituted. It is also a non-legislative commission, however, which means that it has no legislative powers. Its main activities include the examination of gender equality policy through information sessions with members of government and other authorities and the drafting of petitions to government on specific women's issues.

1.3 Methods and Procedures for Mainstreaming Gender into Public Policies

Rather than gender mainstreaming, the principal tool used in Spain since 1988 for advancing women's equality in all sectors of society has been the 'equality plan' (Plan para la Igualdad de Oportunidades entre Mujeres y Hombres). This consists of a structured set of initiatives in different domains affecting women, which are in operation for a certain period of time. The areas covered by the plans are as diverse as education, health, economy and employment, empowerment and decision-making, image and mass media, environment, violence, social exclusion, rural women and cooperation with NGOs and international organisations. The plans can be national, regional or local in scope. They are elaborated by the Women's Institute (or regional equality agencies) in consultation with other departments that are involved in their implementation. The Institute is also responsible for their monitoring and evaluation. So far, there have been three national plans covering the periods 1988-1990, 1993-1995 and 1997-2000.⁵ A fourth plan was approved in March 2003.

At a regional level, there has been widespread use of this kind of plan as the main policy instrument of gender equality since 1989. By 1994 all seventeen regions had drafted their own gender equality plans and some of them were on the second.

Although the plans are seen as a first step towards gender mainstreaming - the development of the mainstreaming principle was one of the three objectives around which the third plan was developed (see Instituto de la Mujer 1997, p. 31) - in practice their implementation is not very advanced. According to an evaluation of the third plan carried out by the social democratic party, it completely fails in its objective of integrating a gender perspective across all public policy areas (PSOE 2002, pp. 3-4).

In Spain, there are no systematic and comprehensive gender impact assessments of public policies. Although policies for women promoted by state institutions have been evaluated, there is no assessment of other public policies on gender grounds (Molto & Valiente 2000, p.

⁵ Typically, a gap of two to three years is left between plans. During these interim periods previous plans are evaluated and new ones are drawn up.

5). According to Bustelo (2000) this is due to the fact that, in Spain, evaluation culture is not very developed. This is because: a) evaluation arrived in Spain in a moment of economic crisis and resource scarcity, b) the parliamentary system is based on strong party discipline which tends to limit the controlling function of parliament, c) the number of professionals specialized in evaluation is very scarce and d) the information systems inside public administration are inadequate for evaluation processes.

1.4 Key non-Governmental Stakeholders/Actors

As already mentioned, the principal actor in the development of gender policies in Spain has been the social democratic party.

According to the literature, the women's movement in Spain has been historically quite weak and fragmented (Valiente 1995 p.231; Threlfall 1985, p. 52). Sensat and Varella (1998) point out that, even though the movement made important achievements after Franco's death, the majority of women's organisations in Spain today lack a political vision, instead responding to particularist interests. As a result, the movement lacks the potential to be truly transformative. In addition, as Molto and Valiente (2000) argue, the main architects of equality policies in Spain have been state feminists and feminists within trade unions and political parties, rather than the women's movement. Threlfall (1985) attributes this to a number of difficulties. The first is lack of a feminist tradition, since political gains for women have historically been the outcome of battles between male-dominated political parties rather than the pressure of a powerful women's movement. The second difficulty is lack of political backing by a democratic culture sympathetic to the notion of equal rights. Hence, the movement emerged solely from the political traditions of the left (most early feminists were members, ex-members or sympathisers of one or other of the left parties). A final obstacle for the early women's movement was a dislike of any sex-segregated activity and a strongly negative image of women acting together on the political stage.

However, in recent years there have been some important developments in the women's movement. In 1995 a new umbrella organisation (CELEM) representing 30 different women's groupings was created. In 1998 this organisation published a position paper entitled 'A New Social Contract Between Women and Men' which was widely disseminated. This document contained a commitment to pursue a number of key objectives, as well as a number of proposals aimed at achieving them. These objectives were: (a) sharing both family and work responsibilities between women and men, (b) sharing power and (c) promoting the conditions that will make (a) and (b) possible.

With respect to the relationship between the movement and the Women's Institute, Valiente (1995, p. 231) says that feminists' access to Institute decision making was almost non-existent before 1988 and is still very limited. For example, women's organisations were not consulted in the elaboration of any of the three national plans. However, one of the objectives of the Women's Institute is to collaborate with women's organisations so as to strengthen a weak and atomised feminist movement. This is done by means of financial and technical support in the form of subsidies and accommodation.

1.5 Barriers and Facilitators

1.5.1 Barriers

One important barrier to gender mainstreaming and other gender equality policies in Spain is that their development very much depends on the political party in government.

Apart from this, a lack of tradition of public policy evaluation is also an obstacle. As has already been mentioned, public policies in Spain are not evaluated from a gender perspective,

except for those included in the equality plans. Yet, even these evaluations have been heavily criticised by Bustelo (2000). According to her, the plans' objectives are usually too vague and ambiguous in their formulation, lacking concrete quantitative and qualitative targets. As a result, it is not possible to evaluate the plans properly. Secondly, all evaluations of the plans are post-facto, that is, both the evaluation design and execution take place when an important part of the plan has already been implemented (generally during the last year of the plan period). This renders the evaluation tool weak because it is not designed in parallel with the plan. Thirdly, evaluations of the plans usually fail to distinguish between undertaking an investigation about women's status and one of the impact of the plans on women. In other words, missing from those evaluations is a formal linkage between the variables studied and the particular plan being evaluated.

Another barrier identified by Molto and Valiente (2000) is lack of gender expertise. According to these authors, this is due to a negative image of gender issues amongst researchers and a low degree of institutionalisation of gender studies (e.g., no dedicated gender studies department exists).

In more general terms a strong patriarchal tradition, actively promoted and reinforced during the long forty years of the Franco regime, may also be identified as a barrier to the advancement of women in Spain. According to Ginsborg (2000), male authority and authoritarianism within the family were a paradigm for modern 20th century dictators such as Hitler, Franco and Mussolini. All three regimes evoked traditional family relationships, which they saw as threatened by certain trends of the modern world. In these regimes, women - in particular married women - were not to enter the public sphere, their principal service to the nation lay in the fulfilment of their roles of mothers and carers. Franco's regime, however, can be contrasted with the others in at least in two regards. First of all, the regime was around long enough to make a profound mark on Spanish society. Secondly, in the case of Franco's dictatorship fascist principles were fused with Catholic doctrine, resulting in a regime based in an ideology labelled as 'National Catholicism'. A crucial element of National Catholicism was gender difference (Morcillo 2000, pp. 3-7). However, it is important to note that the hold of the Catholic church during the dictatorship in a society with a strong anti-clerical tradition such as Spain must be open to doubt, according to a number of experts. Thus at the height of the dictatorship, between the years 1950 and 1964, mass attendance on Sundays rarely exceeded 30 per cent (Ginsborg 2000, p. 426).

1.5.2 Facilitators

One characteristic of the Spanish gender machinery that may facilitate the introduction of gender mainstreaming is its high degree of decentralisation, together with a high degree of cooperation between central and regional governments. Although the introduction of gender mainstreaming in Spain may ultimately question the role of the women's equality agencies both at central government level and in every region, the existing network of equality institutions across the country may play a vital role in promoting and advancing the integration of a gender perspective in all policy areas. The practice of equality plans may also be considered a positive factor in that it is systematic and at this stage well-established.

Spain's membership of the EU has also been quite influential in the development of gender equality policies. Upon entry in 1986, Spain endorsed the Second Community Action Programme (1986-1990) with the introduction of the First Equality Plan (1988-1990). Since then, all equality plans introduced to date have been developed within the framework of the various Community Action Programmes. Apart from this, as an EU member Spain has the responsibility to integrate gender mainstreaming as a horizontal principle within the Structural Funds, the National Action Plan for Employment and the National Action Plan for Social Inclusion.

2. GENDER EQUALITY AND GENDER MAINSTREAMING IN SOCIAL PROTECTION AND TAX POLICIES

The Spanish welfare state is strongly based on a social insurance system, financed out of contributions and designed for people who are, or have been, active in the labour market. As a type of welfare state model, it has some Bismarckian origins in that it was historically organised around the protection of core groups of workers. In recent years, however, this system has been complemented by an array of highly fragmented social assistance benefits designed for citizens in situations of need, irrespective of their labour market status. Together, both contributory and non-contributory benefits and programmes are intended to provide universal protection to all citizens, as mandated by the 1978 Constitution.

Although now approaching universal coverage, the Spanish welfare state still has the marks of its Francoist legacy. This is a legacy of a social insurance system constructed along corporatist lines, not only targeted exclusively at workers but marked by dissimilarities among the varied professional categories. In recent years, the system has been integrated to a large extent in a general social insurance programme, but this still co-exists with especial programmes for workers in particular sectors of the economy, such as mining, farming, fishing, domestic work and the self-employed.

The gender impact of this system has been well documented (Consejo Economico y Social 2000). To put it briefly, it is a system that discriminates (albeit indirectly) against women who are not active in the labour market as well as women working in particular sectors of the economy such as farming and domestic work.

2.1 Treatment of Gender in the Policy Content

During the period of authoritarian rule, both the social security and the tax systems presupposed a model of society made up of stable family units that were founded upon marriage. A strong division of labour among members of the family (operating across sex lines) was also presupposed whereby husbands were the sole breadwinners while wives were homemakers and carers. Given this, while men had direct access to the social security system through their participation in the labour market, women's access was indirect, mediated by marital or parental ties. Programmes explicitly favoured one-earner families.

During socialist rule, the most overtly discriminatory aspects of the system were abolished. These included a monthly benefit paid solely to dependent spouses and cash grants paid upon marriage and the birth of each child. Apart from this, a system of compulsory joint taxation was declared unconstitutional in 1989, and made optional as a result (Valiente 1997b, p. 371).

Despite efforts to eliminate the most discriminatory elements however, the system still favours women and men unequally. This is because:

- although the social security system in its contributory mode is targeted to all citizens who are in the labour market regardless of sex, the fact that a significant section of the Spanish female population is not employed renders it indirectly discriminatory, insofar as these women only enjoy derived rights.⁶
- there are still a number of irregularities within the social security system which render it discriminatory. These are irregularities inherited from a corporatist past which was marked by significant differences in social protection coverage for professional categories. For example, the social security programme designed for rural workers

⁶ According to figures from the Women's Institute, 40% of Spanish women were active in 2001, a figure well below the European average (see www.mtas.es/mujer).

explicitly assumes that the beneficiary is the main breadwinner within a family and that he will have dependants. As a result, women who do farming work within the family unit are insufficiently covered since the system regards them as 'dependants'. On the other hand, the social security programme for domestic workers is overtly discriminatory against women (who made up the vast majority of workers in this area) as the programme entitles them to lower levels of protection than other social security programmes (Consejo Economico y Social 2000).

- although in recent years Spanish women have joined the labour market in large numbers, according to Threlfall (1996) they are disproportionately represented among the low paid, unemployed, those with short-term contracts and those in the black market economy. Such circumstances make them highly unlikely to gain entitlement to social insurance, for which a steady contributory record is required.

Recently, there have been a number of gender-sensitive developments in the area of social protection. These include the following:

- new legislation on reconciling work and family life which allows fathers to take up to 10 weeks of the paid leave available to a couple on the birth of a child;
- a tax credit for working mothers with children under three years of age;
- the introduction, in some particular regions, of a salary for carers – a programme that is intended to be extended nationwide.

Apart from this, two particular issues have been subject of recurrent public debate: the introduction of guaranteed child maintenance payments for lone parents and the establishment of a social security pension scheme for homemakers.

2.2 Institutional Architecture and Policy-Making Processes

In Spain, the main institutions with responsibility for income policy are the Ministry of Employment and Social Affairs, which is responsible for social insurance and the Ministry of '*Hacienda*', which oversees taxation policy. Apart from this, regional administrations have responsibility for social assistance benefits and services. With respect to the role played by these bodies in the integration of a gender perspective in income-related policies, all work in collaboration with the Women's Institute in the drafting and implementation of income-related policy measures included in the equality plans.⁷

Regional governments play an important role. For example, they have responsibility for setting and administering a minimum guaranteed social assistance payment known as minimum income for social integration (*renta minima de insercion*). However, the level and entitlement conditions of this payment vary significantly from region to region. This payment is especially important for women who do not have access to the social insurance system.

2.3 Methods and Procedures for Mainstreaming Gender Policies

As is the case with other policy areas, the main tool used in Spain to integrate a gender perspective into social protection policies is the equality plan. Each of the three plans to date has contained a range of measures aimed at improving women's access to social rights and combating women's poverty. For example, the third equality plan (1997-2000) included the following measures:

⁷ In matters relating to social assistance, regional women's agencies work closely with regional departments of social affairs in the drafting and implementation of social assistance-related measures included in the regional equality plans.

- to study and evaluate the special social security programme for domestic workers;
- to evaluate the incidence of women with atypical contracts who gain access to the social security system;
- to consider tax measures that recognise the social role of the homemaker, including commissioning a report on a reform that will allow voluntary pension contributions from this sector;
- to introduce a guaranteed state maintenance payment for lone parents in cases of non-payment of pension by the absent parent;
- to introduce more child tax reductions for lone parents;
- to combat the feminisation of poverty.

Besides the equality plan, the National Action Plan on Social Inclusion (2001) represents an important development in the incorporation of gender mainstreaming principles and processes into Spanish social protection policies. The document explicitly adopts the gender mainstreaming principle, which is intended to apply horizontally across the entire plan. However, women are constructed and treated as a vulnerable group since the focus is specifically on lone mothers, immigrant women, women from the gypsy community, disabled women and so forth. In treating women in this way, the plan could be said to go against the main tenets of gender mainstreaming.

2.4 Key Actors Involved

The main actors are the state, trade unions and political parties on the left, particularly the social democratic party.

The state exercises its influence through the Women's Institute and the relevant ministries. Apart from this, trade unions have played a key role in obtaining gains for working women in relation to maternity benefits, tax credits and programmes for reconciling work and family life. This has been done through collective bargaining. Finally, the political parties on the left have been pushing an equality agenda in income and social security policy that focuses on the individualisation and universalisation of social rights.

2.5 Barriers and Facilitators

In terms of facilitators, the EU social inclusion process, together with its recommendation on gender mainstreaming, provides an opportunity to incorporate a gender perspective into national policies aimed at combating poverty and social exclusion. As has already been noted, the 2001 Spanish National Action Plan on Social Inclusion contained a commitment to gender mainstreaming, although this commitment does not seem to have been implemented in practice. In any case, these shortcomings in the Spanish Plan were pointed out in the Joint Report from the EU, thus putting pressure on the Spanish government to make a firmer and more tangible commitment in the next round of plans (due in 2003).

As for barriers, it is important to note that income and tax policies do not constitute a priority in the agenda of the Women's Institute. Moreover, it is an area barely mentioned in a position document adopted by Spanish women's organisations in 1998, entitled *A New Contract between Women and Men* (CELEM 1998).

3.GENDER EQUALITY AND GENDER MAINSTREAMING IN EDUCATION POLICIES

In the past two decades, education policy in Spain has undergone very important development, especially in relation to equality. These developments have been informed by the principle of equal opportunities in education, which is enshrined in the Spanish Constitution. As regards gender equality specifically, this is a distinctive objective that is made explicit in the general legislation regulating the education system.

After Franco's death, women within the feminist movement made three major demands (Threlfall 1996, p. 135). These were:

- a complete switchover to mixed schools;
- the development of genuinely non-sexist education;
- the eradication of sexism from all official textbooks.

The first demand met little or no resistance. Although sex segregation within schools had been reinstated⁸ and reinforced during the dictatorship, when mixed primary and secondary schooling was made illegal by law, this ban was lifted in 1970. By 1984, single-sex secondary schools in the public sector had virtually ceased to exist, while public primary schools began to integrate from 1985 (Subirats 1994).⁹

With regard to the second and third demands, from 1976 women within the feminist movement began to create a number of coeducation groups ('colectivos de coeducacion'). These groups played a significant role in promoting awareness of a number of sex discrimination issues in relation to education, such as sex stereotyping in textbooks and other educational materials.¹⁰

Apart from this, the Women's Institute is also worthy of mention for its role in the promotion of coeducation. Since its creation the Institute - in collaboration with regional women's agencies - has played a key role in the fight against sex discrimination in education. This has been achieved through a number of initiatives included in the different national equality plans as well as other plans at regional level.

3.1 Treatment of Gender in the Policy Content

The legislative framework regulating Spanish education policy consists of the Constitution (which establishes the basic principles that prevail in legislation on education) and four acts which develop the rights and principles enshrined in it. Gender was not explicitly mentioned in education legislation until 1990, when for the first time in the history of Spanish education law one of those acts recognised the existence of sex discrimination within the education system. This act, on the general organisation of the education system (LOGSE), mandated that all educational activity be reconsidered in light of the principle of equality of opportunity between the sexes (LOGSE 1990, art. 2.c). The act also mandated that the principle of equality between the sexes be taken into account in the design of all educational materials,

⁸ Before Franco seized power, mixed public primary schools had been introduced by law as early as 1909. Also, the II Republic was very favourable to equal opportunities in education.

⁹ However, as Threlfall notes (1996, p. 135), what happens in the private sector - heavily controlled by the Catholic Church - is another matter entirely.

¹⁰ According to the philosophy of coeducation espoused by the feminist movement, mixed schooling is not enough to achieve equal opportunities. Briefly put, coeducation not only requires that girls and boys are educated together but that they both receive the same education, free of sex stereotyping and other discriminatory practices.

aiming towards the elimination of sex stereotyping (LOGSE 1990, art. 57.3). Apart from this, the act introduced a number of new subjects to the curriculum (called 'materias transversales'), which were to be integrated horizontally across it. These included issues of gender equality, alongside more general human rights issues, environmental issues and issues of health. These subjects are conceived as fundamental for the social and personal development of the individual.

Apart from central administrative duties in the field of education, responsibility for education policy in Spain also lies with the different regional administrations. According to some observers (Bonal 1998, p. 156) the decentralisation of the curriculum, which was also established by the LOGSE in 1990, has facilitated the intervention of different groups, including feminists, in the production of education materials.

3.2 Institutional Architecture and Policy-Making Processes

The principal institutions involved in the integration of a gender equality perspective within education policy in Spain are:

- the Women's Institute, together with the diverse regional women's agencies;
- the Ministry of Education and Culture and the different education departments in each of the regional administrations.

The principal role of the Women's Institute and the regional women's agencies lies in the formulation of a number of specific gender equality objectives in the field of education, together with the design of various measures alongside those objectives. These objectives and measures are included in the equality plans. As already mentioned, their implementation ultimately depends on the Ministry of Education and Culture, or the relevant education department at regional level. Apart from this, both the national and the regional Women's Institutes organise their own campaigns and programmes aimed at introducing the principles of coeducation in schools and other positive actions such as helping girls and boys in their choice of a career path, providing advice about sex stereotyping and related matters.

The Ministry of Education and Culture and the regional education departments have a role in implementing the equality policies in relation to education included in the equality plans.

3.3 Methods and Procedures for Mainstreaming Gender in Policies

In Spain, the main policy tool used to integrate a gender equality perspective into education policy has been the equality plans. This practice, however, cannot be properly labelled as 'gender mainstreaming'. One of the reasons for this is that, with the exception of the measures included in the equality plans, education policy is not subjected to systematic impact assessment from a gender equality perspective. In the very recent past (Dec 2002), the parliament has approved a proposal to subject all new legislation to gender impact assessment procedures. It is still too early to know about the effects of such a measure upon education policy.

It is generally agreed that, of the three equality plans implemented thus far, the one that has had the greatest impact on the advancement of gender equality within the education system was the first (1988-1990). Among other things, this introduced the first coeducation programmes in Spanish public schools, as well as the first national plan for adult education and lifelong learning that took into consideration the specific needs of women. In total, the first Equality Plan contained 5 objectives:

- to combat sex stereotyping in the school curriculum and in education materials;

- to promote awareness of gender equality issues among teaching staff through education and training campaigns;
- to guarantee equal opportunities to girls and boys in their access to all forms of education and training, ensuring that every student develops their potential to the full irrespective of their sex.
- to modify the system of lifelong learning according to the specific needs of women;
- to promote an image of women in the mass media that is not discriminatory.

The second Equality Plan (1993-1995) contained nine education-related objectives that built upon those included in its predecessor, while at the same time focusing on the development of employment training programmes for women.

In contrast, the third Plan (1997-2000) contained only four objectives relevant to education. A recent evaluation of the plan carried out by the social democratic party points to its lack of focus on the development of coeducation and, in general, to the vagueness of its objectives. With respect to the level of implementation of the education measures included in the Plan, this evaluation states that only four of its 35 measures have been implemented (PSOE 2002, pp. 16-17). In a similar vein, women's organisations strongly criticise the Third Plan with respect to education. They emphasise the fact that only a handful of the education measures contained in this Plan have been implemented. The lack of regular monitoring and evaluation of those measures also comes in for some criticism.

3.4 Key Actors Involved

The main non-governmental actor involved in the development of gender equality within the education system is the social democratic party. During the 13 years that this party was in office, three important pieces of education legislation were enacted. The most salient feature of such legislation is according to different analysts a strong focus on equality (Bonaf 1998).

The reforms in the education system introduced by the PSOE were firmly supported by one of the main parents' associations in Spain, CEAPA. This is an association that defends a model of public and secular education, free of charge. It stands against state subsidising of private, Catholic education. Parents' associations have also been collaborating in programmes aimed at introducing coeducation in schools.

3.5 Barriers and Facilitators

One of the main potential barriers in the introduction of gender mainstreaming within education policy is the fact that a significant share of its provision is still in the hands of the Catholic Church. Historically, the Catholic Church has been in favour of sex segregation in schools and resistant to the introduction of education models based on the principle of gender equality. For example during the dictatorship - a period when the Catholic Church recovered its traditional monopoly over education - girls were educated completely separately from boys. This education focused on 'home-making' skills such as caring, sewing, cooking and cleaning, while those women who showed a talent for or inclination towards university studies were directed towards a degree in the humanities.

With respect to facilitators, the decentralised model of government has the potential to act as a great facilitator of gender mainstreaming, as the regional women's agencies are strategically placed to work in close collaboration with regional education departments, schools and local women's and parents' associations.

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List of Centres of Competence

Instituto de la Mujer: www.mtas.es/mujer

Consejo Economico y Social: www.ces.es

Instituto Juan March: www.march.es

Consejo Superior de Investigaciones Cientificas: www.csic.es

Instituto Universitario de Estudios de la Mujer – Universidad Autonoma de Madrid:
www.vam.es

Fundacion Mujeres: www.fundacionmujeres.es

**EQUAPOL: Gender-Sensitive and Women-Friendly Public Policies: a
Comparative Analysis of their Progress and Impact**

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FRANCE: STATE OF THE ART REPORT

Deliverable Number 1

Prof Robert Plasman

and

Salimata Sissoko

DULBEA

Université Libre de Bruxelles

Belgium

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1. NATIONAL POLICY FRAMEWORK ON GENDER EQUALITY AND GENDER MAINSTREAMING

1.1 General background

Since the second half of the 20th century, the policy on gender equality in France has been characterised by an ambiguity, reflecting the position of women in French society. First of all, it is a policy of formal equalisation of the latter's status in relation to that of men: the policy of **emancipation**. Yet the realisation of such emancipation is thwarted by the protectionist dimension of **familistic** public policies, based on the conception that an individual can only exist as a member of a family (Jacques Commaille 2001). In addition to family policies there is also France's **comprehensivist** tradition, with its emphasis on the rights of the individual under French Law, treating citizens as equal in abstract. There is thus a deliberate neutrality, foregoing any differentiated treatment (e.g., between genders) (Fouquet Annie and Claude Rack, 1999).

In general terms this comprehensivist French tradition runs counter to European employment strategy on gender equality. However, since the implementation of the NAP, gender mainstreaming and equal opportunities initiatives have been developed at the national as well as the regional and local level.

The equality of rights and the emancipation of women in relation to men were promoted thanks to the mobilisation of militant members of women's associations. Women obtained the right to vote and be elected during the presidency of General De Gaulle in 1944, nearly a century after men, and many female citizens in other European countries. It was also under a right-wing government (presidency of Valérie Giscard d'Estaing) that the Secretariat for Women's Affairs was founded (1974) and Simone Veil (2nd female minister in France) had a law passed on abortion (1975). This Secretariat, as well as its successors until 1981 lacked resources. Under François Mitterrand a "state feminism" was created, devoted to combating unequal treatment of women (Jacques Commaille 2001). In 1981, a Ministry on women's rights was created with a substantial budget (129 million French francs between 1982 and 1989). Also the campaign of minister Yvette Roudy led to the passing of a law on equality in employment in 1983. In 1986, the post of Women's Rights Minister was abolished and the Secretariat for Women's Affairs was re-established. Women's associations aided by their European counterparts mobilized anew, to establish political equality, which led to the passing of a law on equality in 2000. Since 2002, a delegated Minister with special responsibility of parity and occupational equality is in charge of promoting equality between men and women in France (Nicole Ameline).

At the same time, the creation of "state feminism" did not eliminate state "familism", firmly entrenched and defended by family movements. These policies concern the limitation of working hours (e.g. night work), parental and family leave, anti-abortion views, etc.

Since 1999, tools enabling the implementation of gender mainstreaming have been developed at the national as well as at the regional and local level. At the national level, a notable evolution was the adoption in 1999 of a government action platform to encourage equal opportunities. Furthermore, gender-specific employment indicators were created concerning employment policy and measures were taken to promote the participation of women in politics. Also advisory committees on equality were created. All these initiatives are centralised at the national level and are promoted by the Inter-Ministerial Council of Women's Rights (1982). At the regional level, programmes financed by the European Community on employment policy, include gender mainstreaming practices.

1.2 Institutional architecture

There are six key gender equality institutions. At central level: the Women's Rights and Equality Unit (SDFE); the Inter-Ministerial Council on Women's Rights; the Higher Council on Occupational Equality (CSEP); the observatory on equality (OP); and the National Centre of Information and Documentation on Women and Family (CNIDFF). At the regional level, there are the Centres of Information and Documentation on Women and Family (CIDFF). These institutions are briefly described in turn. We also present the post of inter-ministerial delegate on women's rights, reporting directly to the Prime Minister's office, a post created in 1997 and abolished in 1998.

1.2.1 The women's rights and equality Unit (SDFE)

Within the Ministry of Employment, Social Affairs and Solidarity, the minister delegated with special responsibility of parity and occupational equality, is in charge of promoting gender equality. The SDFE is the public service in charge of implementing the ministry's policies. The name of this unit has changed since the seventies: at the beginning (1974) it concerned "the female condition"; later "women's rights", and now its role has been widened to embrace the equality principle itself (the latter change reflects the holistic and transversal approach of all themes concerning gender comparisons). It is a central administrative body with extensive territorial administration, which took a central role in proposing and implementing the 1983 equal employment law. According to the Scottish Office (1998), the policy of the SDFE to fund women's group was not particularly effective in empowering women's interests in policy process. Funds were badly administered and allocated to quasi-state organisation rather than independent interests. Eventually those feminist activists that were based in the Ministry left to be replaced by career civil servants.

In the framework of its transversal policy, the SDFE maintains a close working relationship with other departments of the Ministry of Employment, Social Affairs and Solidarity and with other Ministries and networks of associations. For example, regarding the ministry, a work program has been developed with the General Delegation for Employment and Vocational Training (DGEFP). Also a working team on "occupational equality" was set up within the Department of research, studies and statistics (DARES) or partnerships with other administrative bodies, under the supervision of the ministry, were established. Amongst these are: the association for vocational training for adults (AFPA), the national agency for employment (ANPE) and the national agency for improvement of working conditions (ANACT).

Recent collaborations with other ministries have led to a cooperation agreement for the promotion of gender equality in the educational system. This has been signed by five Ministries on the 25th February 2000 (The minister for Employment and Solidarity, the minister of National Education, of Research and Technology, the Ministry of Agriculture and Fishing; and the minister with special responsibility for women's rights and vocational training). Each ministry accepted the obligation to report on the financial efforts of the government to promote gender equality programs. In addition a network of referees on the multi-annual action plans on equality have been set up by the Ministry of Public Service and State Reform in 2002.

1.2.2 The Higher Council on Occupational Equality (CSEP)

The CSEP was set up in 1983 in order to stimulate debate on occupational equality. The Council consists of representatives of trade unions, employers' associations and advisory bodies.

Its functions are: (1) to propose measures concerning gender equality; (2) to carry out studies and research for improving occupation equality; (3) to give advice on legislation concerning female employment in general, and on the Labour Code regarding occupation equality in particular.

In France, laws regarding equality at work are the 1983 law on occupational equality (“the Roudy Law”) and the May 2001 law on occupation equality, which introduces compulsory bargaining on occupational equality at national and sector level, as well as equality in all other bargaining processes (notably pay and working hours). The participation of social partners to the occupational equality issue is then facilitated by their presence in the CSEP. It has to be noted here that although a law imposing occupational equality was voted in France rather early (1983) and the law of 2001 imposes compulsory negotiations on occupational equality, those measures are almost without result. The first one is not obeyed in numerous instances and does not carry sanctions in case of non-compliance. As far as the second is concerned, the obligation to negotiate does not come with an obligation to conclude agreements.

1.2.3 The Observatory on equality (OP)

The OP is a service set up by the Prime Minister. It was created in 1995 by the Juppé government and, in its advisory capacity, it contributes to the development of public policies in favour of gender equality. Since its creation, the mission of the OP has been extended. It includes today: (1) the identification, the assessment and analysis of gender inequalities in the political, economic and social sphere; (2) the production and dissemination of data on women at the national and international level; (3) the development of proposals and recommendations to promote gender equality.

According to the Scottish Office (1998) the OP is considered by searchers to be under-funded, poorly staffed and without clear mission and it has been unable to have any meaningful impact upon equal opportunities.

1.2.4 The Inter-Ministerial Council for Women’s Rights

The Inter-Ministerial Council for Women’s Rights was established in 1982 and was the first step towards the implementation of gender mainstreaming in public policy. According to SDFE, its effectiveness is hampered by its informal nature. In fact it did not meet officially until 1991. Since then, the Prime Minister calls a meeting from time to time (symbolically) but not systematically. During the meeting of March 8, 2000, the Council adopted a multi-annual Action Plan on equal opportunities between the sexes, comprising 8 strategies:

- encouraging access by women to positions of great responsibility;
- promoting occupational equality between men and women;
- developing women’s contribution to economic growth;
- promoting women’s rights;
- facilitating the use of time for women;
- developing the female dimension in the cultural sphere;
- developing European and international actions for equality;
- reinforcing tools for equality.

This post however was abolished in 1998. This was due to the broadening of the portfolio of the secretary for vocational education which includes women's rights for employment.

1.2.5 The National Centre of Information and Documentation on Women and the Family (CNIDFF) and Centre for Women's Rights (CIDFF)

The Centre for Women's Rights (CIDFF) is supervised by the National Centre of Information and Documentation on Women and the Family (CNIDFF), created in 1972. It acts under the authority of the Minister of Employment and Solidarity, who is responsible for women's rights. The associative network of CIDFF is present at the national, regional and local level.

1.3 Methods and procedures for mainstreaming gender into public policies

The principal tools for mainstreaming gender in public policies are to be found at the national level.

1.3.1 The governmental partnership

The French government showed in 1999 its will to implement gender mainstreaming. The authorities in charge for gender equality proposed an **innovative mainstreaming process** by introducing **a governmental partnership in order to build a platform of concrete proposals**.

As a first step, three lines of action were outlined: (1) occupational equality, (2) parity and access of women to positions of greater responsibility and, (3) the protection and reinforcement of specific women's rights.

The responsibility for the implementation of these policies lies with the Inter-Ministerial Council for Women's Rights. The Committee, in 2000, developed the multi-annual action plan of equal opportunities between men and women. But as previously observed, the Council is not a formal actor and does not meet regularly. The follow up of measures is not ensured and it seems that creating bodies or undertaking policy measures is not sufficient to guarantee for the implementation of gender mainstreaming. A closer follow up of measures undertaken, and, certain adjustments seem indeed a necessary precondition for the functioning of these measures.

1.3.2 Legislation for gender equality

A report by Catherine Génisson (2000) on **occupational inequality between men and women** underlines the deficiencies of the 1983 Roudy law and the persistence of gender inequalities (wage, under-employment, part-time employment, access to vocational training, etc.). The Roudy Law establishes the occupational equality in companies. Each year, Companies have to produce a report concerning the working and training conditions of women. This assessment confirms that the principle of occupational equality is sometime explicitly violated or even simply ignored. However, this comparative report on the situation of women compared to men introduced by the Roudy law seems not to be efficient enough. Indeed many companies do not make such a report or, when it is provided, the report is too complex to be efficiently exploited and cannot be compared across companies.

Hence, Catherine Génisson proposes to simplify the report and extend this obligation to sectors with a comparable report for the Public Services.

In addition to the Roudy law, the 9th May 2001 law on occupation equality has introduced compulsory bargain on occupational equality at national and sector level, as well as equality in all other bargaining process (notably pay and working hours). The participation of social

partners to the occupational equality issue is facilitated by their presence in the Higher Council on Occupational Equality.

However, the effects of these laws are rather limited. The Law of 1983 does not contain any sanction for non-complying companies. On the other hand, the law of 2001 does not make the signature of agreements mandatory. Moreover, according to Silvera (2002, p.12) negotiating equality in a specific way had little effect. Indeed, inequality is built into all negotiations and cannot be reduced afterwards by corrective measures *ex post*. Only upstream thinking, which is transversal to all bargains, could break the vicious circle.

1.3.3 Legislation on gender equality and public and political life

Law (2000) concerning public services, introduces the balanced representation of women and men in juries for entrance exams and occupational exams, as well as in civil service consultative bodies. Furthermore, the law of June 2000 establishes parity in electoral lists at local, regional, national and European elections (equal number of male and female candidates). As far as the election of deputies is concerned, such balance is not mandatory, however parties not respecting the gender parity are penalised through the public-party financing system.

The municipal elections of 2001, for which the law imposes the admission of 50% of candidates of each sex (to the nearest unit) on pain of rejection of the electoral list, enabled massive election of women to municipal councils. The proportion of women elected municipal councillors increased from 21.7% in 1995 to 33% in 2001. However, the legislative elections in 2002, for which the law only foresees fines in case of non-compliance with the law, demonstrates the limitations of such law as the main French political parties (UMP, UDF, PS) had not respected it, preferring to pay sanctions rather than adhering to the law.

1.3.4 Statistics and indicators

A gender mainstreaming process calls also for statistics and information concerning gender equality. The approach relies heavily both on statistical information and research based knowledge concerning gender processes and outcomes. This is more than a question about disaggregated statistics by gender and concerns the general status and competence of knowledge and research on gender relations in national research.

This problem was taken into account by the former government in 2000, with the circular concerning the adaptation of the state statistical body in order to improve the knowledge of the situation of women and men. Moreover, a group headed by the INSEE (National Institute of Statistics and Economic Studies) has been set up to identify all fields where unequal opportunities are observed, at either national or local level, and to make policy proposals. In the National Action Plans for Employment, the Ministry of Labour and Employment has set out a strategy of implementing and reinforcing gender-based statistical tools and indicators for monitoring the place of women in most employment-policy measures.

Efforts are also aimed at increasing the awareness and training inside the ministries and public employment services.

1.3.5 The experiment “Trans-faire” in Rhône-Alpes

Certain regional experiments show the way to an efficient gender mainstreaming strategy. Characteristic is the case of the programme “Trans-faire” in the Rhone-Alps region. This project is financed by the European Community in the framework of the 4th Community action programme for equal opportunities between women and men (1996-2000). It is managed jointly by the regional delegation for women’s rights and the secretariat for social

affairs. Presently, this programme continues and is financed by the Region and the European Structural Funds (ESF).

Its objective is the sustained mobilisation of public policies for equal opportunities in the area of a three-pronged employment orientation: 1) employment of young people, 2) professional equality in companies, and 3) achieving a balance between working/private life, social and civic life.

This approach is well suited for a mainstreaming approach since it relies on the **mobilisation of local decision-makers**, political decision-makers (department prefects, public employment service actors, etc.) and those in the “civil society” (training institutions, social partners, associations and employers’ groups).

The originality of the approach is that it distinguishes what pertains to: (1) **specific or positive actions**, falling within the competence of the regional delegation for women’s rights (second-chance education for the poorest women or “laboratory” actions for co-education at the workplace); (2) the **global approach** where each actor of the principal state services in the regions is asked to formulate his/her proposals to further gender equality in the framework of the tasks carried out by him/her.

Furthermore, the Rhone-Alps region project is the first to have signed a regional equal opportunities action plan (2001-2006).

1.4 Stakeholders/actors

1.4.1 French Women’s Movement

There are many women’s associations in France. The three principal ones have sub-branches at local level. They are the Action Catholique Générale Féminine (ACGF, 1901); Femmes Solidaires (Ex-Union of French Women, 1944); and the Union Féminine Civique et Sociale (UFCS, 1925). Others, with a narrower geographical spread, deal particularly with women’s work, education and diversification of careers and equality in politics. The main ones are: Women university graduates (1920), women of all professions (BPW, 1930); and the Assembly of Women (1992).

The policy of gender equality owes a lot to scientific research and documentation activities as well as the militancy of women’s associations, which not only contributed to the evolution of social conscience of the gender issue, but also actively promoted policy actions by exercising pressure on relevant institutions. The sociology of work started looking at women only at the beginning of the sixties. Before that, workers were treated as neutral and “studies on women’s work were more considered as women’s work than that of sociologists” (Maruani 2001). At the time, women were flooding into the labour market. The feminist movements challenged and criticised the family model and the specialisation of conjugal roles (May 68) and women obtained the Neuwirth law (authorising modern contraception 1967). The seventies were the years of feminist movements. The associations continued to fight for abortion and female researchers demonstrated the oppression of women and the divide between work and family. Long ignored in social sciences due to their militancy, these female researchers would be at the origin of a whole new trend of research, particularly in sociology and history. The first research objects, across all disciplines, were women and slightly later paternity (Ferrand 2001). In the eighties “state feminism” introduced by Mitterrand enabled female researchers to take part in politics (studies on women in administration, law on professional equality 1983, etc.). The nineties saw the development of women’s studies analysing, rather than presenting particularities or singularities of women, the differences and disparities between the genders (Maruani 2001). Women’s associations and researchers in favour of political

equality increased political pressure with studies and publications on the subject, until the law on political equality passed in 2000.

1.4.2 Trade Unions

The principal unions in France are the General Confederation of Labour (CGT, 1895) and the French Confederation of Christian Workers (CFTC, 1920). The latter split in 1967 into two organisations. One remained the CFTC and the other became the French Confederation of Workers (CFDT). There is also the SUD (Solidaires–Unitaires–Democratiques, a splinter group of the CFDT) and the General Confederation of Executives (CGC).

The French unions attract few women. Not only do they have few women members but women are also proportionally less likely to join a union than men. In 2000, women made up 49.7% of the active population but represented only e.g., 30-33% of CGT members, 42% of CFDT members and 40% of SUD members. This situation is improving as these proportions were approximately 30% for the CGT, CFDT and CFTC in 1970 (Guilbert 1974). Women actively participated in some big union mobilisations (at the turn of the century, in May 68, in actions by nurses and the fight for the 35-hour week in recent years). It should be borne in mind that until the turn of the century, militant trade unionists were shown to be hostile to women's work. And to this day women joining a union have difficulties in reaching certain levels of authority. This deficiency has a negative impact on negotiations. Only 30% of companies adhere to the Roudy law (1983) concerning professional equality. Unequal salaries persist and the job classification system still puts women at a disadvantage. Actions were, however, taken at the unions' instigation concerning job classification, which led to the definition of a certain number of criteria (qualifications, responsibilities, efforts, working conditions, etc.), applicable to all professions. But, as argued by Lemièrre and Silvera (2001), good legislation implemented in France on equal pay and equal treatment has achieved little because of the need for involvement by the social partners. There is no proper representation of women in the decision-making process and collective bargaining process of trade unions. Moreover, the decentralisation of collective bargaining has had a negative impact in this context.

1.5 Barriers and facilitators

1.5.1 Barriers

The principal barriers that may be discerned from this section are first of all the translation and hence the difficulty of conveying the concept of the term "gender mainstreaming". Rachel Silvera (1999) notes that in non-English speaking countries, a first check arises in the implementation of mainstreaming: the impossibility to translate this concept in other languages. This remark is not purely a question of wording. It arises from a certain reluctance towards approving a concept and a tool which cannot be translated straightforwardly (a whole sentence is necessary in most other languages).

Secondly, the conflict between gender mainstreaming and positive actions and the fear to see the positive actions disappear may constitute another barrier. This is already the case in France, where certain measures aimed for example at unemployed women have disappeared. In the same way, groups leading actions for the defence or representation of women could in the end lose their legitimacy if mainstreaming is implemented through an integration of actions throughout the policies. Only the most determined pressure groups could then be taken into consideration in the policy decisions, which would lead to intensifying inequalities among women, according to their power of representativeness (Silvera 1999).

Finally, another barrier seems to be the weakness of trade unions. Trade union representatives are too weak and not interested in promoting gender equality. In fact, one recent measure could have a direct impact on the gender wage gap. The law (9 May 2001), makes it compulsory to link occupational equality with pay bargaining and should, in the end, make it possible to highlight inequalities between men and women and plan for reducing the gender wage gap. The weakness of trade unions in companies causes problems of implementation of such a law. What will happen in many companies, where there are no trade union representatives able to bargain? Moreover, although there is a “*femmes et mixité*” section in most trade-unions, which is responsible for handling the whole file at a central level, federations which transversally integrate equality are rare. Equality does not constitute a priority axis of action. It seems therefore logical that equality is very seldom taken into account during negotiations.

1.5.2 Facilitators

Pressure from Women’s Organisations is undoubtedly a facilitator for mainstreaming gender into policy. The activity of various women’s associations in France, keep alive the debate on equality at different levels of society. Furthermore, the recent access from which gender questions benefit in the field of science has allowed the carrying out of abundant research in social sciences. This research builds new approaches and highlights new sets of problems for the analysis of the place of women in society. They also allow better awareness of problems and the proposal of solutions, as well as a means of pressure on policy-makers.

Secondly, the left wing political ideology is also a facilitator. The timing and evolution of gender mainstreaming depends heavily on internal politics. In France, commitments to gender mainstreaming have gone hand in hand with the Jospin government’s development of a broader programme for gender equality, associated with measures to increase women’s representation in the political process. Under such politics there seemed to be the emergence of what can be called “an equality reflex” in the development of public policy. Some doubts rise concerning the 2002 conservative government with regards to its emphasis on family values.

2. GENDER EQUALITY AND GENDER MAINSTREAMING IN SOCIAL PROTECTION AND TAX POLICIES

The social welfare and taxation system in France is highly centralised. For this reason, we will conduct an analysis at the central level in this section.

The system of social security has been created in 1945. This is an earnings related system which represents a combination of Bismarck’s (contributory system) model of social insurances as well as Beveridge’s model (non-contributory system) of social security. It aims to protect workers and their family against risks of all kinds liable to reduce or suppress their earnings. Later on it has been extended to the whole population conditionally to nationality/residence and contribution. The French welfare system is a complex entity, it is not individualised and beside the system, there are a number of complementary bodies aimed at compensating the deficiencies of the basic system.

Due to the low birth rate, one of the aims of social security was to protect the “family” based on a specialisation of conjugal roles, domestic for women, professional for men. This kind of family will be protected because it represents the ideal model to assure the reproduction of society (Ferrand 2001). In this model, the woman has rights deriving from her husband for healthcare cover as well as for her own resources in case her husband dies.

Regarding gender equality, this system raises the problem that despite the fact that women fully take part in professional activity, with high rates throughout their life, and in the form of full-time employment, (part time being a relatively recent development), social protection remains based upon the traditional family model, of specific roles between men and women. Even though the position of the married woman at home, dependent on her husband, has very much changed, it is nevertheless the case that, considering the inequalities on the labour market and the asymmetry of the roles played in the family, a derived rights system can negatively affect the women's labour offer by prompting them to leave the labour market or never enter it (Kerschen and Lanquetin 1997).

On the other hand, under European influence and that of the National Action Plans for Employment (1998), the employment-friendly policy in France led to modifications of the tax system. Social contributions and taxes have been reduced for low paid workers and allowances increased for people with financial difficulties (whether in work or not). Also, there exist many possibilities for women to make leave arrangements. However, enhanced leave arrangements in a context where the impact is likely to be a strengthening of women's connection to the labour market, through reducing the number of women who feel obliged to quit the labour market when they have children, could be considered to have a positive gender equality effect. The problem in the French context is that these leave arrangements have effect on the inactivity trap by discouraging beneficiaries (mainly women) for going back to work and do not reinforce the connection to the labour market.

2.1 Treatment of gender in the policy content

The gender dimension has been taken into account in the French pension system, a mixed contributory and non-contributory system, since it partially corrects the random nature of trajectories on the labour market. The reform of the pensions system undertaken in 1993 in the private sector entailed the modification of calculation methods of pensions allocated to pensioners. Thus, the calculation of the reference wage, which was based on the 10 most prosperous years, is now based on the 25 most prosperous years. The duration of the insurance required to obtain the right to a full-rate pension likewise increased from 150 to 160 per quarter (from 37.5 to 40 years). Furthermore, the same law of July 22, 1993 created the old-age solidarity fund, which strengthens the non-contributory side. This falls under the competence of national solidarity of the French pension system (minimum old age, periods not covered, particularly due to child education and increase of pensions for dependent children). These modifications may affect gender equality. A study carried out by the National Old-Age Pension Insurance Fund (CNAV) on the effects of the reform (taking into account 25 years) shows that the replacement factor increases from 1 to 3 points for a woman born in 1955 as opposed to a woman born in 1934 unaffected by the reform. For men in the same age group, it would be 5 to 8 points less. Annie Gauvin (1997) cautions that these conclusions may not be representative as they are the result of typical cases chosen (reference career of 40 years) and given the flat profile of reference careers for women (as opposed to those of men with an upward tendency), extending the reference period is less disadvantageous for women. A study by National institute for statistics and economics studies (INSEE), which measured the effects of contributory and non-contributory dimensions of the French pension system, shows that the effect of these non-contributory rules on the average level of pensions by professional category and by gender, tends to diminish the higher up people climb on the social ladder. And we know that women benefit appreciably from minimum contribution mechanisms (Gauvin 1997).

Up to the present time, and unlike many other European countries such as the Netherlands, Spain, Ireland, and Belgium, the debate on the individualisation of social rights has merely begun in France. Yet progress has been made concerning health insurance. Indeed, since 1999

the **Universal Sickness Cover** (CMU) has been created. It insures everyone, even the poorest, so that they have access to health care. It grants the right to health care as a personal and fundamental right. The CMU reinforces the degree of independence of women, in particular, that of those who did have a job but are only partly entitled to rights through their spouse. Although the derived rights have allowed the extension of social protection, even though this increased protection was based on dependence, this model of family norm is profitable in certain cases, for the traditional large families and the ones that are in financial difficulties.

According to N. Kerschen and M-T Lanquetin (1997), the non-individualisation of rights is open to criticism from a judicial, social and economic viewpoint. The creation of a universal sickness cover has allowed to palliate those deficiencies in the field of healthcare. From a judicial viewpoint, the old health insurance system kept a certain number of women in a situation of inequality with regard to fundamental social rights like the right to healthcare. From a social and economic viewpoint, the absence of a right creates a genuine insecurity. Such a situation constitutes an attack on one's autonomy and dignity.

On the other hand, according to Catherine Zaidam (1997), this critique of the French system should be qualified somewhat. First of all, the study of foreign social welfare systems shows that even so-called "comprehensivist" systems guarantee a pension for all citizens which is always supplemented by occupational pension schemes (Jepsen, Meulders and Plasman, 1997). Secondly, civil as well as social legislations have changed since 1945, and now there are no or very few direct discriminations in the French social welfare system (only provisions favourable to women remain).

More recently, measures were taken in the framework of the European strategy for employment. It concerns reductions of social security contributions, taxes on low pay and the creation of ease of combining allowances and work. These measures can have effects on women's situation. Unfortunately the *ex ante* and *ex poste* evaluation of the effects of these measures is still too rarely carried out.

Concerning **social contributions** Rachel Silvera (2002) notices that the effect of the reduced employment contribution is a very controversial topic in France. First, there is a polemic concerning the number of jobs created (460 000 jobs between 1994 and 1997, half of them were unskilled according to the INSEE). Various economists contest these results and consider that they over-estimate the real situation (figures are not in full-time equivalent). Secondly, it seems that the policy of reducing social contributions on low pay tends to put a brake on pay increase. Indeed, it becomes costly for employers to increase pay as any increase costs more in terms of social contributions. Such employees are thus caught in "low pay traps" (This concerns more women than men).

The author specifies that half of newly created jobs are occupied by women, while the proportion of women in unskilled jobs and in part-time jobs is particularly high. Thus, between 1982 and 2001 the proportion of women in unskilled job has increased (from 52% to 60%) and part-time work and other types of casual status have increased in these job. This kind of job insecurity is significantly higher than in skilled employment (30% of unskilled employment is part-time against 12 % of "other employees", also 17% are casual among the unskilled compared to 7% of others). So the effects of reduced social contributions regarding low wage employees do not seem to have equal effects on men and women and entail the risk of discriminating against women by reinforcing part-time and low-skill traps.

Concerning the **reduction of taxes for low paid workers**, this essentially consists of the employment bonus (PPE) introduced in 2001. This employment bonus is available to workers who earn low and middle incomes. The bonus varies according to one's family situation (number of children and people without income in the household). There has been little assessment of this measure in terms of gender. But this tax measure could have a negative

effect on the employment of those women who are in most fragile situations. It is revealing to observe that a complementary file, that assesses the effect of this measure on the income of those on low pay-before and after this reform-is based on two cases, namely a single person without children and a couple, economically active-with two dependent children. Whereas, in fact, dual earning couples are increasingly frequent amongst those on low pay but this case is not present. However, in this case, the positive effect would be smaller and the marginal gain from going back to work (passing from RMI (minimum insertion income) to part-time work) would be negative for the second income (Rachel Silvera 2002).

Finally concerning the allowance sphere, the Parental Presence leave for sick child (APP) was created in 2001 and measures permitting allowances to be received such as the Parental Child Allowance (APE), the specific solidarity allowance (ASS), the insertion allowance (AI), the minimum income of insertion (RMI), the isolated parental allowance (API), and the widow allowance, together with a professional income for a limited period, have been developed.

Furthermore, towards an aim of greater equality and involvement of fathers in their children's care, the APP comes with of a higher allowance if the leave is shared by father and mother and the paid paternity leave has been extended from 3 to 14 days. These measures are welcome since parental leave can have inactivity trap effects and discriminate mothers that are in a situation of insecurity on the labour market. Nevertheless, in order to encourage and make the return to the labour market easier after an absence linked to the children's education, those women should also be offered greater child-minding possibilities, and this, also with more extensive schedules.

2.2 Institutional architecture and policy-making processes

Social welfare policy is extremely centralized in France and is conducted mainly by the Minister for Social Affairs, Labour and Solidarity. The tax policy is conducted by the Ministry for the Economy, Finance and Industry.

Gender equality policy is the responsibility of the Ministry of Social Affairs, Labour and Solidarity, and has been carried out by the Women's Rights Service since 2002. This service is part of the realisation of the Action Plan against poverty and social exclusion (2001-2003), a plan containing tax and social welfare measures for people in difficulties (women, young people, the unemployed, etc.).

The National Council for policies to combat poverty and social exclusion (CNLE) plays an important role in the implementation of a strategy to combat social exclusion. The CNLE has a dialogue and partnership function. It is composed of nationally and locally elected members, of administrative officers, of NGO's operating in the area of social exclusion, qualified personalities and representatives of other consultative organisms with competence in the area of social exclusion.

2.3 Methods and procedures for mainstreaming gender in policies

Gender mainstreaming is not systematically applied in all fields concerning social protection and tax policies. Nevertheless, an important area, where mainstreaming is applied, is the National Action Plan for social Inclusion (NAP/incl, 2001-2003).

Concerning this issue, women are presented as a vulnerable group. Hence all actions are aiming at increasing female participation in society, equality in general and equal opportunities. The social inclusion strategy is based on the governmental programme and realised through a broad dialogue between actors.

The NAP/incl. adds new dimensions to the implementation of mainstreaming. The approach is twofold: (1) developing policies of access to employment, based on the NAP/empl, and (2)

mobilising different public and private actors in order to enhance awareness of their rights. The mobilisation of actors introduces a reinforced coordination between relevant public services and a close collaboration of all partners concerned, in particular territorial committees. It comprises a statistical annex that includes 162 indicators (all broken down by gender) for follow-up and evaluation with the aim of following on from the progress already made in the realisation of Community objectives.

2.4 Key actors involved

Apart from the SDFE that takes care, in the Ministry of Social Affairs, Labour and Solidarity, of social welfare from the gender point of view, some unions claim to defend greater equality between the sexes (particularly the CGT and CFTC). Furthermore, la FO (Labour Force), SUD, FSU, CFDT and the CGT mobilised against the reform of pensions in the private sector in 1993 (increase of the duration of required contributions from 37.5 to 40 years, pension calculation based on the 25 most prosperous years). This reform put women at a disadvantage (particularly the lengthening of the contribution period) but was nevertheless implemented. At present, this reform continues in the public sector, giving rise to harsh reactions from all trade unions.

2.5 Barriers and facilitators

Under the impetus of the EU, France has in fact undertaken several measures that have a positive impact on women but we cannot talk about mainstreaming. In addition the current social protection and tax systems still discriminate against women. The lack of will to take this topic into account remains the main barrier. Moreover the weakness of social partners allows this to happen.

This lack of political will is linked with the priority granted to the family in public policies. This priority is reflected in the “familialiste” foundations of the French system of social protection, in other words the room granted to the family in the access to rights, through the derived rights approach.

Moreover, the promotion of in-work benefits as a means of promoting participation in low paid work may indicate a failure of gender mainstreaming. This policy is a way of reducing unemployment and is in fact developed as a separate agenda from equal opportunities and the promotion of female participation, even though the vast majority of those who benefit (the low paid) are women.

3. GENDER EQUALITY AND GENDER MAINSTREAMING IN EDUCATION POLICIES.

State education in France, which accommodates 80% of the student population, is non-religious. Private education also exists. It mainly comprises Catholic establishments that have drawn up a contract with the State. Metropolitan France and the overseas regions are divided into 32 academies that are the administrative districts specific to the public service of National Education. Roughly each of these academies corresponds to a region. At the head of each academy, the chief education officer, high-ranking civil servant, represents the National Education Minister.

The definition and the implementation of the education policy are the responsibility of the government, within the general framework established by the policy-maker, who, under the terms of the Constitution, only establishes the “general principles” that are to be applied to the teaching system.

Within the government, the National education, research and technology Ministry is responsible for education policy. The minister is assisted by a ministerial delegate who is responsible for academic teaching. Furthermore, the agriculture and fishing minister is in charge of agricultural teaching; the employment and solidarity minister plays an important role in professional training. The French educational system was traditionally and historically extremely centralised. By deciding to transfer a certain number of powers and responsibilities to the territorial communities that were exercised by the State until that time, France has committed itself, as from 1982, to an important decentralisation action. The decentralisation laws of 1982 and 1983 have considerably increased the role of regions and departments. The regions have notably been attributed with the responsibility for the operation of high schools (higher secondary education); the departments have received the same rights for secondary schools (lower secondary education), while districts continue to implement those for primary schools. Within higher education, the law of the 26th of January 1984 grants administrative, financial, educational and scientific autonomy to universities.

3.1 Treatment of gender in the policy content

The minister of National Education has taken measures to guarantee equal opportunities in education. In 1998, a campaign on the presence of women and men in the national education system was proposed. This was followed, in 1999-2000, by the signing of an Inter-Ministerial agreement on promoting equality in the educational system (campaign of raising awareness of teachers, teaching tools, etc.). This trend was confirmed in 2001 and included dissemination of a teaching pack on equality; study of the place of girls in certain subjects (IT, electronics, textiles, personal services, etc.); creation of an information centre on gender in Lyon; creation of a unit on “women and science” in the Research Ministry. This followed from efforts made in 2000 around a symposium on “Science and technology: why young women?”, which aimed at promoting women in these subjects (information and improved guidance and research grants for young women, better gender balance amongst members of recruitment juries, etc.).

According to R. Silvera (2001, p.21), overall, it should be emphasised that this aspect of French policy is consistent and efforts to raise awareness and develop training are real. Now their effectiveness needs to be evaluated. It is of course difficult to measure their results, because such policies are long-term.

According to Catherine Marry (2001, p.35-36), numerous French researchers have analysed the spectacular progress of women throughout the last decades. These advances show that girls record better results than boys. Yet social imbalances remain, since girls and boys do not choose the same courses of study. For some authors, the explanation for those differences in choice is a mechanism of auto-selection/exclusion (in the family and at school), which excludes girls at decisive moments of a course of study, especially at the end of secondary grammar school (“college”) or in the first year at college (“lycée”). They have to show greater academic excellence, especially in scientific subjects, in order to dare specialize in (and to be steered towards) scientific subjects of excellence, which lead to university. Others regard those differences in career as being the result of women’s conscious and rational strategies given their knowledge of the professional possibilities, which await them on the labour market. More recently, studies have analysed the transformations in the academic and professional contexts, which have backed the expansion of women’s schooling and professional activity and allowed some of them to break the traditional positions.

3.2 Institutional architecture and policy-making processes

In 2000, the national inter-ministerial piloting committee and inter-ministerial groups (in academies) were created to ensure the follow-up of the agreement for the promotion of the

equality between the sexes in the education system. This agreement was effected between the Minister of National Education, the Minister for Employment and Solidarity, the Minister of Research and Technology, the Ministry of Agriculture and Fishing and the Minister with special responsibility for women's rights and vocational training, the 25th February 2000.

3.2.1 The Inter-Ministerial Committee.

This inter-ministerial committee is chaired by the female rector of the Toulouse academy. It is composed of forty members of the Ministry of National Education, Research and Technology Ministry, Ministry of Agriculture and Fishing and the Women's Rights and Equality Unit.

3.2.2 A mission for equality

This mission has been assigned to the director for school education, in charge of promoting the implementation and follow-up of actions concerning gender equality at the Ministry of National Education. It will ensure the implementation of the convention of February 25, 2000. It relies on intermediaries in each division of the Ministry. Moreover, it runs the network of persons in charge of the academic mission for equal opportunities.

3.2.3 The piloting committees for equality in academies

The National Inter-Ministerial Committee is helped by Inter-Ministerial groups established in each academy. These Inter-Ministry groups are composed of regional delegates and departmental representatives to the women's rights and equality from professional associations, consular chambers, the decentralised services of the Ministry of Employment, the department of Social Affairs and Solidarity, the department of Agriculture and Fishing and various associations.

3.2.4 Persons in charge of the mission for equal opportunities in each rectorate

These groups are animated by the persons in charge of the mission for equal opportunities often established in the academic information and orientation services (SAIO). These persons with a mission are authorized to implement the convention of February 25, 2000, from nursery school to university.

3.3 Methods and procedures for gender mainstreaming in policies

Recent governments have taken a lot of measures aimed at improving gender equality and reducing inequalities in general. But, it does not seem to systematically mainstream all their actions in education. Nevertheless a real willingness to reach gender equality is observed and some mainstreaming practices are implemented.

Here again the mainstreaming strategy is based on a governmental partnership, allowing the integration of the gender issue in all fields.

3.3.1 An Inter-Ministerial Committee to follow-up the agreement of 25 February 2000

The advantages of this collaboration are numerous. Thanks to the diversity of the composition of the committee, the selective interventions of personalities participating, the new bonds between actors, allow each partner to better delimit his/her field of actions and to reinforce the coherence and complementarity of measures implemented. The Council is in charge of the development and the follow-up of measures concerning equality between girls and boys, men and women in the Ministry of National Education.

The agreement points to the importance of treatment and publication of gender-based data. Analysing them seems in fact being priority in determining causes of such inequality and to fix objectives in terms of advancement of girls.

3.3.2 Programmes for the Reform of Curricula

Known as “charte pour l’école (et college) pour le 21ème siècle”, this reform has three orientations: refocusing on basic skills (national plan for reading); the practice of a living language (early training in a foreign language); and the mastery of new technologies (action plan for the information society).

We have noted that girls are fewer than boys in scientific and technological fields. This action of promoting new technologies for all can have a positive impact on girls and increase their career choice in technological domains.

3.3.3 Life-long learning

The system of validation of occupational experience has been created in 2000 (the validation on occupational experience makes it possible to recognize all experience for everyone, including those who are not in the labour market). This system can have a positive effect on the access of women to continuous education. In fact the system concerns more women (55% of candidates in 2001) than men. It is free for unemployed and low paid workers and touches companies of over 10 employees (27%), of less than 10 employees (16.5%) and public services (14%), places where female employment is concentrated.

In addition, “open”, “free-time” or “third-year” universities provide education for increasing number of people (people in early retirement, retirement or women without paid employment, active persons, students). The “students” are in majority women (60%) who are aged over 60 (89%). There is no entrance and exit diploma. These universities are grouped within the French Union of All Age Universities (UFUTA). There is also an Association of French People’s University (AUPF).

Over the last ten years members of these universities have increased, but the growth is limited by their reception capacities. France is far from the significance attributed to the phenomenon in some Northern European countries.

3.4 Key actors

Outside the ministry of national education, the academies (or regions), departments, communes and universities, parent and teachers associations should be involved in educational policies.

Government sources assert that parent associations as well as teacher associations intervene at all levels of education and all administrative levels (school, departmental, academic and national level). Also, according to the same sources, the associations are increasingly involved in decision-making, particularly in the context of their participation in the different bodies for which they elect representatives.

However, according to some persons in charge of equal opportunities, in practice these associations are not involved in decisions related to the promotion of equal opportunities in the educational system currently operated in France.

3.5 Barriers and facilitators

Formerly regarded as a barrier, and today as a facilitator towards equality between girls and boys in education, are the educational patterns, which used to convey gender stereotypes and

steer women towards the place which was assigned to them in society. This has led to greater equality in parents' investments in their daughters' and sons' academic and professional success and has given a more important role to the mother's transmission in the emancipation dynamics of girls.

Once again, measures have been introduced taking into account the gender aspect. We can associate these with positive action but not with gender mainstreaming.

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List of centres of competence

GOVERNMENTAL INSTITUTIONS:

The minister with special responsibility for women's rights and vocational training

<http://www.social.gouv.fr/femmes>

Service for women's rights and equality: <http://www.social.gouv.fr/femmes>

The Higher Council on Occupational Equality

The observatory on equality : <http://www.observatoire-parite.gouv.fr>

NON-GOVERNMENTAL INSTITUTIONS:

The National Centre of Information and Documentation on Woman and Family

<http://www.infofemmes.com>

The Centre on Women's Rights: <http://www.social.gouv.fr/femmes/>

**EQUAPOL: Gender Sensitive and Women Friendly Public Policies: A
Comparative Analysis of Their Progress and Impact**

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GREECE: STATE OF THE ART REPORT
Deliverable Number 1

Dr. Yiouli Papadiamantaki

and

Vasso Riga

With the collaboration of

Dr. Maria Stratigaki and Prof. Nikos Kokossalakis

KEKMOKOP, Panteion University Athens

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1. NATIONAL POLICY FRAMEWORK ON GENDER EQUALITY AND GENDER MAINSTREAMING

1.1. General background.

Greece does not have a long tradition in promoting and implementing gender equality policies. In fact it is only during the last 25 years that an equality dimension has been introduced in public policy generally. Hence, Greece can be considered a “newcomer to the field”. Women were granted full voting rights only in 1952. According to Giotopoulou-Marangopoulou (1995:17-19) this decision came as a consequence of the ratification of international conventions (such as the UN Universal Declaration of Human Rights, the Rome Convention and the International New York Convention "for women's civil rights) rather than social pressure exerted by women's organisations.

Two landmarks should be mentioned in the development of gender equality policies in Greece.

- The legal reform stemming from a Constitutional revision in 1975,
- The institutional reform and the subsequent formation of actual policies, by the socialist party PASOK, which came to power in 1981, advocating extensive social reform in all policy domains.

In the same year (1981) Greece became a full member of the E.E.C. In this social and political context the Greek women's movement entered a militant phase. Women's organisations became highly politicized and acted as pressure groups for legal and institutional reform and the promotion of gender equality policies.

Several legal experts have pointed out that the revision of the Constitution in 1975 was a decisive step for the promotion of equality policies in the public sector (Koumantos 1989, Androulidaki-Dimitriadi 1995). In this revision it was stated for the first time that: “all Greeks are equal before the law and Greek men and women have equal rights and obligations” (Greek Constitution 1975, art. 4). Furthermore, the revision incorporated human rights put forth by International Law (i.e. the United Nations Convention for the Elimination of Discrimination against Women and the European Social Charter put forth by the Council of Europe). After the revision the State is obliged to protect the right(s) to work, social insurance, education and vocational training, and prohibit any form of sex discrimination. Laws 1423/84, 1424/84 and 1576/85 ratify the 122nd, the 111th and the 156/86 International Labour Conventions respectively.

The Constitution also provided that by 1982 Family Law should be revised according to the principle of equality (Koumantos 1995:29). Thus, the new Family Law (1329/83) altered radically the legal status of women within the family, while health and maternity were also protected. The “patriarchal family” (whereby the husband was considered the head of the family) was replaced by the notion of “*equality of the spouses within the institution of marriage*”. Also provisions for the property relations between the spouses changed. At the dissolution of a marriage, property acquired during the marriage should be equitably apportioned, the wife receiving at least 1/3 of the property.

So, the constitutional revision and the directives of E.U. provided the basis for the introduction of equality principles in labour relations (Koukouli-Spiliotopoulou 1995). Article 22 of the Constitution (on equal pay for equal work) and Directives 75/117 and 76/207 led to the introduction of Laws 1414/84 and 1483/84, which aimed at providing for equality between women and men, in social security and employment. Law 1414/84 provided that all citizens are entitled to free access to work, vocational training and professional orientation,

irrespective of sex. It specified that women be entitled to all forms of benefits (marriage, family, etc.) under the same conditions as men. Law 1483/84 focused on the protection of maternity rights. It prohibited firing women during pregnancy and for a one-year period after childbirth and introduced a maternity leave and an unpaid parental leave of absence (for a 3-month period).

At the last Constitutional reform (2000) positive action is introduced in the Greek Constitution by the adoption of Article 116, which goes beyond the equivalent provision of the Treaty of the European Union (Article 141)

The legal reform thus provided a framework to combat discrimination against women, but de facto inequalities, stemming from the inadequate application of the law and the lack of controlling mechanisms, still prevail. Policy makers, however, appear in favour of the EU policies for gender equality, which advocates both the development of positive action and the adoption of the mainstreaming perspective (Stratigaki, 2002).

It seems that key-actors, at the governmental and the non-governmental levels are not convinced that gender mainstreaming can combat successfully the forms of inequality that de facto still prevail. It has been argued that there is an inherent danger in mainstreaming, namely that the bureaucratic (and men-dominated) mechanisms will slow down positive action in favour of women or hamper the function of specialised organisations for equality. (Gender Mainstreaming 1999:13)

The concept of mainstreaming was introduced in the political discourse in 1999. The current *National Programme for Gender Equality: 2001-2006* put forth by the Secretariat General for Equality (2001:1), states that gender mainstreaming will be the basic tool for the implementation of equality policies. Mainstreaming is introduced in public policy, through actions developed under the umbrella of the 3rd Community Support Framework (CSF). It should be noted that CSF funds are used to fund a good part of social policies for the period 2000-2006.

1.2. Institutional architecture

Statutory institutions, to help the government develop equality policies, were formed at the national and the regional/local level in the 80's. In 1982 a nine-member "Council for the Equality of Sexes" was founded (Law 1288/82) which acted as an autonomous advisory body, answering directly to the Prime Minister (1st National Report, CEDAW, 1986).

1.2.1 The General Secretariat for Equality

By Law 1558/88, the Council for the Equality of Sexes was replaced by the General Secretariat for Equality (GSE), which is supervised by the Ministry of Interior, Public Administration and Decentralisation. The GSE is the competent authority for the designing and implementation of policies related to equality, in the political, economic, social and cultural domains. (2nd and 3rd National Report, CEDAW, 1993) Its current priorities are determined by the 3rd Community Support Framework and incorporate measures of the National Action Plans for Employment as well as the major objectives of EU policies for gender equality.

In its advisory capacity it aims at the diffusion of the mainstreaming perspective in all public policies as well as being the promoter of the development of positive action to ensure the realisation of equal opportunities between men and women. To fulfil this role the Secretariat, publishes studies and/or reports to facilitate the planning of public policies and disseminates information on equality matters. In these matters the Secretariat is assisted by the "The Research Centre for Gender Equality" (KETHI).

1.2.2. The Research Centre for Gender Equality (KETHI)

The Research Centre for Gender Equality (KETHI) was founded in 1994. KETHI is supervised and funded by the GSE. The basic aim of KETHI's activities is to conduct research on gender equality and women's advancement in all areas of political, economic and social life, within the framework of the policies defined by the GSE (4th and 5rd National Report, CEDAW, 2000). The Centre comprises:

- Information and Counselling Centres for Women's Employment and Social Integration which address unemployed women, women threatened by unemployment; as well as women facing social exclusion and in need of legal aid.
- A Documentation Unit that develops databases, collects and produces documentation material and disseminates information concerning women's rights and gender equality policies.

KETHI's current activities include: (a) training and sensitising teachers on gender equality with regard to education; (b) enhancing the operation of the Centres for Children's Creativity and developing their network; (c) developing a network of support structures for women's employment in Greece and in the European Union; (d) providing information on gender equality policies in Greece and in the European Union; (e) co-operating with international organisations for the mutual exchange of information on gender equality (www.kethi.gr).

1.2.3. The Inter-Ministerial Committee for Gender Equality

The Committee was set up by Prime Minister's decision (NR. Y316/14-7-00), but it is not functioning systematically yet. It is supposed to co-ordinate policies and support Ministries and other governmental bodies so that positive action policies and mainstreaming are developed at national, local and regional levels and be incorporated in all policies. Within this framework it is stipulated that the Committee will prepare every year a National Action Plan and will set up a board to supervise the realisation of the programmes and evaluate results.

1.2.4 Parliamentary Committee for Gender Equality and Human Rights

In the Parliament a twelve member special, permanent committee for Gender Equality is established. The committee puts forth proposals aiming to foster the family education and other social institutions. It also aims to consolidate and strengthen the implementation of the equality principal in public administration and labour issues.

1.2.5 Regional/Local Level Institutional Organisation

In 1983 a circular of the General Secretary of the Ministry of the Interior established (in the 52 prefectures of Greece) Prefecture Equality Committees and Prefecture Equality Offices to ensure the better information of the citizens at the regional level. These Committees functioned informally until 1994 when the relative legislation was passed. In 1994 Laws 2218 and 2240 were passed which decreed that the Equality Offices constituted autonomous administrative units, with their own funds.

In 1998, Regional Equality Centres went into operation in each region, in order to promote and implement gender equality (4th and 5rd National Report, CEDAW, 2000). In 2000 Law 2839 (promoted by the GSE) decreed that in each one of the 13 regions of Greece a Regional Equality Committee is founded in replacement of the Regional Equality Centres. Their function focuses on the implementation of policies for equal opportunities for men and women and the diffusion of mainstreaming in regional policies.

1.3 Methods and procedures for mainstreaming gender into public policies

Since the 80's a four-step strategy for the promotion of gender equality appears to comprise (a) legal reform, (b) institutional reform, (c) creation of suitable political structures (i.e. General Secretariat for Equality) and (d), promotion of women in the decision-making centres (Koutsilaïou 1998:35).

Women's organisations have argued that a prerequisite for the development of de facto equality and the formation of proper relevant policies is the promotion of women in politics and the decision-making centres. However, art. 116 of the 1975 Constitution, prohibiting divergence from the equality principle, inhibited positive action in favour of women. In 2000 the Parliament accepted the position argued by women's organisations that positive action does not contradict the constitutional provisions and revised article 116, which now states: "adoption of positive measures for promoting equality between men and women does not constitute discrimination on the basis of sex. The State shall attend to the elimination of inequalities actually existing, especially to the detriment of women" (Greek Constitution art.116).

In this context Vasso Papandreou, Minister of the Interior, Public Administration and Decentralisation passed Law 2839/2000, introducing a 1/3 quota for the participation of women in all decision-making centers of the public sector (i.e. Ministerial, Municipal and Regional Committees or enterprises and organisations of the Public Sector). In 2001 she passed Law 2910/01, which introduces the 1/3 quota for the participation of women in all ballot papers at elections for Municipal and Prefecture Authorities.

Quantitative tools that could ensure the proper application of gender equality objectives and gender mainstreaming approach are under development by the respective Ministries according to prescriptions by EU in Regulations concerning the implementation of the CSF. National Statistics are disaggregated by sex and ex-ante evaluation of gender impact is introduced in several programmes (for example the ones developed in the framework of the Operational Programme for Education and Initial Vocational Training (EPEAEK). However, benchmarking or other indicators that would enable refined statistical analysis have not been produced as yet.

1.4 Key non-Governmental actors.

The key non-governmental actors for positive action/mainstreaming are women's organisations, which have acted as pressure groups promoting positive action for gender equality. Today 70 women's organisations are active in Greece. Of these, 45 are represented in the Greek Section of European Women's Lobby and operate both on the international and the national level. A Secretariat for the Equality of the Greek General Confederation of Labour (GSEE) has been established but its role in mainstreaming gender into public policies seems to be minimal.

Gender equality objectives, which have mobilised recently Women's NGO in Greece include: the Revision of the Constitution, the promotion of women in politics and the combat against domestic violence and trafficking in women.

Active in gender equality issues are also a number of feminist groups (left feminists, lesbian, women against violence, women against war, etc) who are co-ordinating their action under the umbrella of the Feminist Centre in Athens.

1.5 Barriers and facilitators.

It has been already noted that there were no original indigenous policies for gender equality in Greece. The relative policies developed mainly under the influence of policies promoted by

international organisations. In this sense the integration of Greece in the international system (membership in the UN, Council of Europe, etc.) and especially its participation in the European Union since 1981 can be considered a major facilitator for the promotion of positive action/mainstreaming.

A second facilitator can be considered the action taken and the demands put forth by women's organisations and the feminist movement, which speeded up legal and institutional reforms.

On the negative side one may note:

- (a) the absence of research on gender issues and women and gender studies in the Universities,, which could help design more effective strategies/policies for positive action/mainstreaming.
- (b) A policy culture that appears to resist the use of a very technical approach, such as mainstreaming and tends to favour the application of a more straightforward approach such as positive action. Suffice it to say here that this barrier, which is accompanied by various attitudes and stereotypes about the position and role of women in society, is most recalcitrant and difficult to combat. It is very difficult to pinpoint or isolate it as it is diffused in tradition and society at large.

2. GENDER EQUALITY AND GENDER MAINSTREAMING IN SOCIAL PROTECTION AND TAX POLICIES

Comparative theorizing work on typologies of welfare states either distinguished in liberal, conservative/corporatist and social democratic regimes or introduced a forth -the "southern" type of welfare state- and reclaimed the specificity of Southern Europe incorporating particular characteristics more important being:

- the role of the family and kingship networks (welfare agents on which they rely to delay or hide unemployment and combat poverty, to provide free care of children and the elderly etc),
- clientelism ingrained in politics
- irrationality of the bureaucracy etc..

However, as feminist scholars noticed, gender has been neglected from mainstream analysis of welfare state typologies. They thus, offered alternative theories that either centred on women or suggested an analysis that encompasses both men and women.

Social protection in Greece is underpinned by a strong breadwinner model and the greek welfare regime has been characterised as traditional and family centred treating women mainly as dependants (?aramessini 2001a, 2001b, 2002a, 2002b, 2002c, Koukouli-Spiliotopoulou 1995, 2002, Petroglou 1998, Matsaganis ?a?Petroglou 2002, Riga 1993, 1996, Symeonidou 1997). Although the legal position of women has profoundly changed in the last two decades the strong breadwinner model has not yet been substantially modified.

Social security benefits are based on a Bismarckian model (?aramessini 2002b, Petmesidou 1996, Provopoulos & Tinios 1993, Robolis 2001, Robolis 2002) and strongly related to previous employment status, thereby maintaining gender distinctions. The Greek pension system makes it difficult for women to obtain an adequate pension of their own because it is strongly biased towards highly paid full-time continuous employment. Moreover, where women's entitlements to social security have been as dependants, for example as widows or mothers, they have not fared particularly well, with low levels of benefits compared to male benefits.

2.1 Treatment of gender in the policy content

In the field of Social Protection the principal EU Directives, which forced important changes in the social security system of Greece, are:

- Directive 79/7 (23-12-1984) on the progressive implementation of the principle of equal treatment for men and women in matters of social security.
- Directive 86/378 on the implementation of the principle of equal treatment of men and women in occupational social security schemes
- Directive 86/613 on the principle of equal treatment of men and women engaged in an activity in a self-employed capacity (including agriculture) and on the protection of self-employed women during pregnancy and motherhood (4th and 5th National Report CEDAW 2000, Petroglou 2002).

Integration of the above legislative framework in Greece took place in the 80s and 90s and further significant progress has been made as far as legal changes are concerned (Laws: 1257/82, 1286/82, 1296/82, 1302/83, 1397/83, 1329/83, 1414/84, 1483/84, 1419/84, 1469/84, 1568/85, 1609/86, 1813/88, 1902/90, 1976/91, 2071/92, 2082/92, 2084/92, 2676/99, 3029/02). The most distinct features that have a direct or indirect effect on women's pensions are cited below.

By Laws 1902 and 2084, the extremely low (15 years) minimum duration of insurance coverage to acquire eligibility to a pension (for women working in the public sector) was abolished, as reflecting patriarchal stereotypes and perpetuating gender inequalities.

By Law 1287/82 an individual (extremely low) pension was granted to women farmers.

Law 2084/92 equalised women's retirement age with that of men (65 years) for those who entered the labour market after 1993.

Maternity leave (20 weeks for public sector employees, 17 weeks for private sector employees) is considered as period of insurance (periods of childcare for benefit calculation) by Law 1469/84.

Parental leave (9 months) is considered as period of insurance only for civil servants. Private sector employees are allowed to 3 ½ months per child, as long as they pay for theirs, as well as, their employer's contributions (Law 2084/92). It should also be noted, that state supported childcare in Greece is amongst the lowest in OECD countries (Karamessini 2003).

Contribution credits (1, 1 ½ and 2 years for the first, second and third child correspondingly) are given to mothers (Law 3029/02) for children born after 1.1.2003 (attributed to the father if the mother doesn't make use).

The survivor's benefit amounts to 50% of the deceased's pension benefit.

Pension benefit calculation is based on the average earnings of the last five years of working life.

In general, it has to be noted however, that retirement rules are not the same for all insured women. They are more favourable to those working in the public sector than those working in the private sector (Petroglou 2002).

Substantial domestic legislation in the field of tax policy can be summarised in Laws 3323/1955 and 3846/1958 and their modifications in Laws 824/1978 and Law 2065/1992. However, neither Law 2238/1994, which constitutes an important coding of Income Tax, or any further modifications, incorporated the legislative or any policy changes that have occurred, to promote implementation of the principle of equality between sexes. It even contradicts (article 5 referring to taxation of married couples and their under-aged children)

the Family Law implemented in 1983 and continues to treat married couples as one unit (Avdi-Kalkani, 1998).

2.2 Institutional architecture

Social protection is rather centralised in Greece pursued mainly by the Ministry of Labour and Social Security. Tax policy is planned and carried out by the Ministry of Economics and Finance.

Despite the establishment of the Division of Sickness and Maternity and the Dept. of Gender Equality (Law 1414/84) in the Division of Work Conditions of Directorate-General of Labour (Ministry of Labour and Social Security) their role is administrative. They neither pursue a consultative role nor they engage in policies promoting gender mainstreaming in social protection.

In the most recent major reform of the Social Security system (Law 3029/2002) the role of the social partners was rather limited at all stages of the process, from the initial formation of the commission of advisors and executives, to the final elaboration of the Bill submitted to the Parliament on Social Security.

Despite the insistent calls of the GSE and the work undertaken by KETHI, it was only after the intervention of A. Karamanou, (a member of the Committee of the European Parliament for Women's Rights and Equality of Opportunities and the Socialist Group of the European Parliament who organised a day conference on the Reform of the Social Security System and Equality between Sexes) that proposals from the participating experts were taken into consideration (at an advisory level) by the Ministry Committee without however having an immediate implementation in the most recent Reform of the Social Security System (Law 3029/2002).

The role of Trade Unions (Secretariat for Equality of the Greek General Confederation of Labour -GSEE-), as well as, NGOs was restrained thus signifying that they are not identified as key partners in shaping and implementing the social protection agenda.

2.3 Methods and procedures for mainstreaming gender in policies

Recent gender mainstreaming processes include the National Action Plan on Social Integration 2001-2003 conducted by the Ministries of Labour and Social Security, Public Administration and Decentralisation, National Education and Religious Affairs, Economics and Finance, initiated by the EU in the aftermath of the Treaty of Amsterdam, (June 1997).

Evidence shows that wage rates and earnings are lower for women than for men, access to jobs (especially well paid jobs) is more limited and employment conditions are more precarious (Petrinioti 1989, Stratigaki & Vaiou 1994). These, along with the negative effect of women's role as wives and mothers and further financial dependency on men, results to lower social protection entitlements for women (Karamessini 2003, Koukouli-Spiliotopoulou 2002, Symeonidou 1997). Elderly women are therefore likely to experience poverty either as wives of retired men or as widows. Nevertheless, women's poverty is an issue largely invisible in existing research on poverty in Greece.

2.4 Key actors involved

It is impossible to integrate equal opportunities in social protection policies without the participation of the institutions working for gender equality into decision-making centres. The existence of institutionalised structures (i.e. the General Secretariat for Equality etc), trade

unions (i.e. Secretariat for Equality of the Greek General Confederation of Labour –GSEE-), NGOs (i.e. the Greek sections of the European Women’s Lobby or the European Forum of Left Feminists etc) etc should be viewed as important progress into promoting the principle of equality between men and women but does not ensure gender mainstreaming in the fields of Social Protection and tax Policy given their limited access in shaping and implementing policies.

2.5 Barriers and facilitators

The European Union played an important part in the equal treatment for men and women. Article 119 of the EC Treaty and the directives implementing the principle of equal pay for equal work constituted the basis for later EU legislation concerning the improvement of women’s position.

Greece’s compliance with the above legislation and its earlier pioneering legislation in the 80s, marked the most important changes in the area of gender equality and established Greece as one of the most progressive countries in the European Union. (Douka & Stergiou 1996, Spiliotopoulos 1996).

However de jure equality did not reflect de facto equality. Thus, despite the promotion of a number of measures, aiming to promote gender equality, still, women’s social rights in Greece are mainly derived rights and marital status, motherhood, gender inequalities in the labour market are factors that may cause a continuity of disadvantage to occur (Riga 1996, Symeonidou 1997). Social protection policies need reshaping to satisfy the challenges and opportunities of the emerging longevity with special emphasis on the new role of the families in a multigenerational and ageing society. Furthermore, limited research in the fields of social protection and tax policy does not facilitate advancements in the field of policy making.

3. GENDER EQUALITY AND GENDER MAINSTREAMING IN EDUCATION POLICIES.

The Greek education system can be described as public (95% of the pupil population attend public schools, and only 5% attend private schools). The system is highly centralised and controlled by the Ministry of National Education and Religious Affairs (MoE) (Dimaras 1995). The Ministry and its affiliated institutes, is the sole authority for the planning and implementation of educational policy. This means that the MoE sets guidelines on all important education issues. One main flaw in the system, which current policy, still under development and not yet implemented, aims to amend, concerns the lack of controlling and evaluating mechanisms that would enable the MoE to assess the results of the implemented policies. Despite the extremely centralized nature of the system there is room for substantial autonomy in teachers’ educational practice and variance in the implementation of circulars/directives etc. This situation has one major implication for policy-making process, namely that no educational reform can succeed in Greece unless it is fully embraced and backed up by the teachers.

3.1 Treatment of gender in the policy content

Since 1982 a co-education policy has been adopted in primary and secondary education (Law 1304). The last forms of inequality based on sex discrimination were amended by law 1286/82, which granted to women access to Military Schools, the Police Academy etc. and to

men access to Departments of Pre-primary Education and Nursing Departments. Currently there are no barriers concerning the access of women to any level of the education system.

However gender mainstreaming has only recently been introduced in educational policy. Till 2000, gender policies appeared related mainly to an equal opportunities / social inclusion perspective.

There is limited high quality research concerning gender issues in education. Judging from the existing literature one may separate the issues concerning educational policy in compulsory and post-compulsory education. Issues concerning gender in compulsory education, focus mainly on the stereotypical representation of women in textbooks, the “hidden” curriculum and the low professional status/position of women-teachers in the education system and the sensitisation of schoolteachers on equality issues.

Issues concerning gender in post-compulsory and higher education are less studied. They focus on the necessity to encourage women to participate in scientific fields where they are under-represented and to promote women in research (Alipranti-Maratou, 2002). It is noted that although female participation in higher education has markedly risen since the 70’s women are under-represented in “hard science” disciplines, (engineering, information technology etc). A second issue concerns the development of gender studies in universities (Women’s Studies in Greece and the European Experience, 1996).

3.2 Institutional architecture

The sole competent authority for the design and implementation of educational policy is the *Ministry of National Education and Religious Affairs*. Current education policy is mainly developed within the “Operational Program for Education and Initial Vocational Training”, (EPEAEK) which uses both positive action and mainstreaming to promote gender equality.

In order to cope with the task the MoE has created an EPEAEK Management Operation Unit, whose purpose is to design, realise and evaluate actions/measures/ programmes funded by the Ministry. Two governmental advisory bodies aid the Ministry in this task: the *Pedagogic Institute* and the *Centre for Educational Research*. Their current priorities focus on the research and evaluation of the education policies developed within the EPEAEK framework. Furthermore, the GSE participated (with one member) in the work group that designed the guidelines of EPEAEK. The purpose of the participation of a GSE member was to help incorporate positive action measures and develop a mainstreaming approach in the programme. However, the co-operation between MoE and GSE is rather limited since the GSE does not participate in the evaluation of EPEAEK programmes.

3.3 Methods and procedures for mainstreaming gender in policies

Nowadays education policy is developed within the EPEAEK framework, which since 2001 has entered its second phase. As the MoE has undertaken the obligation to promote gender equality through EPEAEK II, a gender dimension has been included in four of the six axes of the program, either in the form of positive action (Axis 4) or in the form of mainstreaming (Axes 1,2,3). EPEAEK II is a venture funded jointly by the State (25%) and the European Union (75% - Community Support Framework).

EPEAEK II is structured around the following axes:

Axis 1: Promoting equality of opportunity and equal access to the labour market (combating social exclusion). EPEAEK II, funds allocated: 13,3%.

Axis 2: Improving the quality of education and vocational training systems (within the framework of LLL). EPEAEK II, funds allocated: 61,7%.

- Axis 3:** Encouragement of the entrepreneurial abilities of students. EPEAEK II, funds allocated: 0,8 %.
- Axis 4:** Improvement of the access/integration of women in the labour market. EPEAEK II, funds allocated: 2,8%.
- Axis 5:** Developing/upgrading the technical infrastructures of education institutions. EPEAEK II, funds allocated: 20,5%.
- Axis 6:** Technical Support. EPEAEK II, funds allocated: 0,9%. (*EPEAEK II Program Supplement*)

3.3.1 Positive Action for Women

Axis 4, Measure 4.1: “Programmes on the education and vocational training of women”. These comprise: (a) programmes for the sensitisation of schoolteachers on equality issues, (b) programmes concerning the professional orientation of the female student population, (c) development of special teaching material to introduce equality issues in educational practice, (d) distance learning programmes for women, (e) creation of institutional structures for the evaluation of equality policies.

Axis 4, Measure 4.2: “Support of women in Undergraduate and Postgraduate Studies. Development of Post-doctoral studies and Research programmes for women”. Actions under these measure aim at: (a) the development of undergraduate and post-graduate women studies programmes, (b) funding research by female researchers in science and technology, (c) programmes for female researchers (*EPEAEK II Program Supplement*, pp 235-257).

3.3.2. Mainstreaming Equality

Axis 1, Measure 1.2: “Minimising drop-outs at compulsory education level”. Specific programmes comprise: (a) supplementary afternoon classes for students having difficulties comprehending the curriculum material, (b) development of new teaching material, (c) institution of the All-Day School (Law 2525/98). The evaluation report, by the EPEAEK follow up Committee, (2001 *Evaluation Report*, 2002) calculated that approximately 30% of the funds allocated to these measures could be considered as mainstreaming equality. Several programmes designed under (a) and (b) aimed at preventing girls from dropping-out in subjects on information technologies and natural sciences. The All-Day School is considered as “good mainstreaming practice” since it facilitates parents to take up full time jobs.

Axis 2, Measure 2.1: “Upgrading the quality of the education system”. The participation of women teachers in teacher training programmes led to the estimate that 15% of the funds under this measure could be considered as supplementary to Axis 4 (*EPEAEK II Program Supplement*, pp 395-406).

Axis 2, Measure 2.2: “Reform of study-programmes at the compulsory level”. Such programmes target the stereotypical representation of women in education textbooks (*EPEAEK II Program Supplement*, p.410).

Axis 2, Measure 2.4: aims at the development of programmes related to (a) the professional orientation of secondary education pupils, (b) the development of skills that allow better integration in the labour market and (c) the linkage of the education system to the labour market. Several of these programmes target the female population and encourage female pupils to pursue studies in fields where women are under-representation (for example towards Technical Vocational Educational Schools-TEE) (*EPEAEK II Program Supplement*, pp 431-440).

Axis 3, Measure 3.1: The axis comprises one measure aiming at the development of the entrepreneurial abilities of students. It is expected that the programmes will help promote mainstreaming (*EPEAEK II Program Supplement*, pp 215-217).

It should be noted that, according to EU recommendations, ex-ante evaluations have been developed for all measures/actions designed under EPEAEK and there is a follow up committee that assesses the maturity of the funded programmes and the effected progress. It is the intention of the MoE to create a database in the Ministry, which will include, besides other educational data, sex segregated statistics on education as well as composite indicators/benchmarks (produced along EU lines). This would facilitate both the design and assessment of policies. Till now such infrastructure does not exist.

3.4 Key non-governmental actors

One would expect that the main non-governmental actors to be involved would be academics, schoolteachers' professional associations and parents' associations.

Schoolteachers professional associations and parents' associations appear to have nothing to say concerning mainstreaming equality in education. Also, very limited appears to be the involvement of academics in research on equality issues. It should be noted that most of the existing literature on the subject is produced by (women) academics of the Interdisciplinary Program for Women Studies (University of Thessaloniki). The minimal involvement of academics in gender issues may be related to the professional placement of women academics, which remain mostly at the lower levels of academia.

3.5 Barriers and facilitators

It appears that EU policies, proposals and guidelines are a major facilitator for the development of mainstreaming/positive action policies in the education sector.

As barriers can be identified: the lack of controlling and evaluating mechanisms for the assessment of policy; the lack of infrastructure (development of databases, proper statistical indicators, benchmarks etc); the minimal co-operation between Ministries; as well as the lack of relevant high-quality research (in turn related to the underdevelopment of women/gender studies in universities). All these factors appear to call for the modernization of social administration structures, as the existing policy culture does not favour the implementation and assessment of specifically targeted and highly technical policies.

Furthermore, it has been argued by Kazamias and Kassotakis (1995) that the centralisation of the education system hampers the development of "a social partnership" in which schoolteachers and parents' associations would contribute to the development of educational policy. This in turn may be related to political clientelism) which still prevails and to the underdevelopment/under-representation of "civil society".

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List of centres of competence

The General Secretariat for Equality: www.isotita.gr

The Research Centre for Gender Equality (KETHI): www.kethi.gr

Ministry of National Education and Religious Affairs: www.ypepth.gr

Management Operation Unit / EPEAEK 2: <http://195.167.92.227/epeaek.gr>

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Ministry of Labour and Social Security: <http://www.labor-ministry.gr>

**EQUAPOL: Gender Sensitive and Women Friendly Public Policies: A
Comparative Analysis of Their Progress and Impact**

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IRELAND: STATE OF THE ART REPORT

Deliverable Number 1

Prof. Mary Daly

and

Sara Clavero

School of Sociology and Social Policy

Queen's University, Belfast

Northern Ireland

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**1.NATIONAL POLICY FRAMEWORK ON GENDER EQUALITY AND GENDER
MAINSTREAMING**

1.1 General Background

There have been two distinct periods in the Irish equality trajectory.

A first period, starting in the early 1970s and more or less coinciding with Ireland's accession to the EC in 1973, was marked by the introduction of legislation on equal pay and equal treatment for women in the workplace. This legislation, enacted mainly in order to comply with EC social directives, was Ireland's first experience of legislating for gender equality. Two main pieces of legislation were introduced in this period. The Anti-Discrimination (Pay) Act, 1974 was enacted to eliminate discrimination in remuneration on grounds of sex or marital status and the Employment Equality Act, 1977, which complements the former, made it unlawful to discriminate on grounds of sex or marital status for the purpose of access to employment, promotion and working conditions. This latter Act also established a state agency with a specific brief on gender equality - the Employment Equality Agency (set up in 1977). During this period, Irish gender equality policy was synonymous with anti-discrimination policy. As Galligan & Carney (2001, p. 9) observe, relevant initiatives were framed in an understanding of equality as an absence of prejudice or discrimination, whereby women as a discriminated group were to be accorded the same rights as men. Equality was seen neither as a matter of equal outcome nor as requiring positive action strategies.

The main drivers of these developments in gender equality policy during the 1970s were both national and international in nature. The early 1970s saw not only the accession of Ireland to the EC but the emergence of a women's liberation movement and the establishment, in 1970, of a national Commission on the Status of Women.

The second phase occurred in the 1990s and was marked by the birth of a new equality paradigm. According to Galligan & Carney (2001, p. 9), a shift in thinking about gender equality had occurred. From absence of discrimination the concept came to be seen as involving equal outcomes. This new paradigm was reflected in important reforms in equality legislation by the end of the decade, including the creation of a new agency and a new legislative definition of the grounds of discrimination and the application of the legislation.

As was the case with developments during the 1970s and 1980s, both national and international forces played a significant role. The highly consensual form of national planning, known as social partnership, was of major significance. Pressure towards reforming the equality agenda came also from the report of the Second Commission on the Status of Women (published in 1993) and women's groups in general. At the same time, the new understanding of equality as equality of outcome was developed in a 1996 report by one of the social partnership advisory bodies – the National Economic and Social Forum.

Reform of the gender equality agenda in Ireland during the 1990s was driven also by important international developments, such as the UN Platform for Action agreed in Beijing in 1995. As a signatory, Ireland was obliged to draw up a national plan for women and to monitor progress in the advancement of women, including gender mainstreaming. The adoption of gender mainstreaming by the EU following Beijing, and in particular the requirement that gender be taken into account in the use of Structural Funds, was another significant factor.

Today, Ireland has a distinctive gender equality policy, the main features of which can be summed up as follows:

- a focus on equality in general rather than gender equality specifically, and to some extent a downgrading of the established focus on gender equality in favour of a generalised drive towards equality;

- a tradition of policy proofing in the domain of poverty which, although recent, was seen to provide a template when it came to implementing gender and equality mainstreaming;
- in the absence of a strong indigenous drive towards gender equality, the role of EU directives and regulations has been very significant;

equality policy in Northern Ireland, with its strong legalistic approach and its generalised interpretation of equality, has been taken as an exemplary model to follow.

1.2 Institutional Architecture

There are four main pillars of the institutional architecture on gender equality in Ireland. These are the relevant government ministry, a specific state agency set up to promote equality, a parliamentary committee and a national NGO representing women.

1.2.1 Department of Justice, Equality and Law Reform

In Ireland a full (and new) ministry for equality was created in early 1993. This new department was given the remit of promoting and implementing equality of treatment for all persons experiencing disability, disadvantage and discrimination. This was to be achieved through institutional, administrative and legal reform. This department was short-lived, however, in that it was merged in 1995 with the Department of Justice which was given the new title 'Department of Justice, Equality and Law Reform'. One consequence of this merger was a downgrading of the status of the minister responsible. Since the policy brief now has only a junior minister assigned to it, it is no longer represented directly at the cabinet. In the view of the National Women's Council (2000), these developments have led to a reduction in the prominence of the gender equality policy profile.

1.2.2 Equality Authority

The Equality Authority, established in 1999, is an independent statutory body with a mandate to eliminate discrimination and promote equality of opportunity. It replaced the Employment Equality Agency which was established in the late 1970s, greatly expanding its role and functions. What is new about the Authority is that it must cover the seven additional grounds of discrimination created by new legislation passed in 1998. Hence, along with existing grounds of gender and marital status, the remit of the Authority (and of legislation) also now includes family status, age, disability, race, sexual orientation, religious belief and membership of the traveller or gypsy community. A second aspect that is new is that it not only covers discrimination in employment but also that in vocational training, advertising, collective agreements, the provision of goods and services and other opportunities to which members of the public generally have access. Mainstreaming equality is included in the Equality Authority's Strategic Plan for the years 2000-2002. Its mission statement contains a commitment to providing leadership in mainstreaming equality across all sectors. It is important to point out that the Authority is independent of the particular political party in government, as is the case for all state agencies in Ireland.

1.2.3 Oireachtas Committee on Women's Rights

This is a parliamentary committee with the brief of advising the national parliament on and raising awareness in matters relating to gender and equality.¹¹ The first such committee –

¹¹ Note that such committees have no permanent existence and have to be reconstituted at the beginning of each new parliament. According to Mahon and Morgan (1999: 63), this has affected continuity and project

which was called the Joint Oireachtas Committee on Women's Rights - was established as an all-party inter-parliamentary committee in 1983. As is the practice with parliamentary committees, it was reconstituted after each election until 1997. However, in line with the general move in Ireland to subsume gender equality issues under the more general rubric of equality, since 1997 there is a specific committee devoted to women's rights. Instead women's issues have been dealt with by a committee with a broader remit (on Justice, Equality, Defence and Women's Rights). According to various experts (Mahon 1995, p. 142; Galligan 2000, p. 108), the first Joint Oireachtas Committee on Women's Rights and its successors up to 1997 became an important parliamentary voice for a woman-centred perspective on public policies. Although it had no power to initiate legislation, it served as a conduit for formulating, representing and legitimising parliamentarians' demands for change. The committee commissioned research and published reports on various aspects of gender inequality and also held public meetings with representatives of women's and other groups. However, according to Galligan (2000, p. 109), the reform of the committee system has had the effect of reducing parliamentary awareness of gender issues and diminishing a formal channel of dialogue between women's groups and political representatives.

1.2.4 National Women's Council of Ireland

The National Women's Council of Ireland was founded in 1973 and was originally known as the Council for the Status of Women. A non-governmental organisation, it is the national representative organisation of women. It currently has some 158 women's organisations and groups affiliated to it, representing some 300,000 women. Funded mainly by government, it was established following the publication in 1972 of the report of the Commission on the Status of Women, which suggested that women's associations should be included in the political process and that state funding be given to an organisation recognised by government as representing women's interests. In 1995 it was renamed the National Women's Council of Ireland.

The Council has sought to articulate a consensus view from among its members, initiated many political campaigns for women's rights and influenced the governmental agenda. According to Galligan (2000, p. 110), the Council is an important part of the institutional framework on gender equality in Ireland, both as an independent advocate and as a social partner. Hence, for example, it plays a significant role in monitoring progress on areas such as the Beijing Platform for Action and since 1997 has been involved in the social partnership process. Furthermore, it has influenced the introduction of a strategy for gender mainstreaming and has played a part in the development of gender mainstreaming tools.

1.3 Mainstreaming Methods and Procedures

There are a number of important points to be noted in advance about the Irish case.

First, gender mainstreaming has been introduced in Ireland only very recently and thus gender-mainstreaming methods are only beginning to be developed and applied. At the moment it is being driven by the National Development Plan (2000-2006) which made €29.5 million for an 'equality for women measure' which, among other things, will involve gender proofing of personnel policies. Secondly, the main focus of (especially recent) policy is equality in general rather than that of women or gender in particular. Thirdly, the domain of mainstreaming (of both equality and gender equality) is developing rapidly. Hence while gender mainstreaming methods are currently being applied only to projects included in the

development. Also, since they are all-party committees, they have to work through consensus with the result that contentious issues dividing parties are generally avoided.

current national development plan, it is intended to incorporate gender mainstreaming across the spectrum of public policy and to adopt an integrated approach to mainstreaming. This means adopting a more coherent approach to the three types of mainstreaming (on gender, equality in general and poverty) that are currently going on.

1.3.1 Gender Proofing and Gender Impact Assessment

The term 'gender proofing' was first introduced in Ireland by the first national development plan (which operated for the 1994 - 1999 period). A limited view of gender proofing prevailed, however, in that it was interpreted to entail little more than the recording of participation rates by gender on relevant programmes included in the plan. It is little surprise, therefore, that the plan is considered to have failed to mainstream a gender equality perspective (Mullally 1999, pp. 11-12). Among the identified shortcomings were a lack of clarity in the criteria used to assess gender relevance, an emphasis on equality of opportunity rather than equality of outcome, a failure to mainstream gender across all programmes and initiatives and a failure to include women within the decision-making bodies.

Recent practice has been very different, not least in that the current national development plan (which runs from 2000 to 2006) has a commitment to mainstreaming gender equality, treating it as a horizontal principle across policy domains of the plan. The approach taken is a multi-dimensional one, involving new structures and new processes. In the first instance, equal opportunities was made one of the criteria for selecting projects to be funded under the plan. Secondly, there is a requirement that indicators be provided for male and female participation where the nature of the assistance permits. Thirdly, the plan states a commitment to the promotion of a balance in the numbers of women and men represented on the committees to monitor and oversee progress on spending under the plan. In addition, these committees must have a representative for equal opportunities (drawn from the relevant government department or statutory body). Furthermore, a gender equality unit has been established in the Department of Justice, Equality and Law Reform to integrate a gender dimension into all services and programmes, including monitoring gender mainstreaming in the educational domain as specified in the national development plan and to advise on the development of appropriate indicators to measure this. Finally, an Equal Opportunities and Social Inclusion Co-ordinating Committee was established to oversee progress on equal opportunities issues in regard to spending. Overall, a relatively comprehensive approach can be seen to have been taken in that, as well as new structures, gender-related matters have been integrated into the criteria for funding and steps taken towards measuring impact. It is also important to point out that in generalising gender proofing to all areas of the national plan Ireland has gone beyond the baseline requirements set by the EU (which would in this context stipulate only that the Structural Fund monies be proofed). In addition, gender proofing as developed in the Irish case is quite broad-ranging in that it applies to the design, implementation, monitoring and evaluation of policy and projects. Despite these important developments in gender mainstreaming methods however, their application is restricted to the projects included in the national plan.

1.4 Key non-Governmental Stakeholders /Actors

As indicated, the development of equality policy in Ireland is now taking place in the arena of social partnership. This means that the principal actors involved are the main partnership stakeholders. The Irish process is a broadly inclusive one, the partners being government, employers, farmers, trade unions and, since 1997, what is called the 'community and voluntary pillar'. The latter includes a representative of women's interests as well as representatives for youth, the disabled, the unemployed and disadvantaged sectors of the population. The specific representation of women's interests is organised through the National

Women's Council (described under 1.2.4 above) which provides delegates to participate in the social partnership process. While not precluding other parties (such as the trade unions) from raising issues relevant to gender and women, the extension of access to social partnership to women's interests renders Ireland unique.

Aside from social partnership, women's groups and organisations have been important actors in the gender equality domain in their own right. There is substantial evidence of a mushrooming of locally based women's groups in Ireland since the mid-1980s (Daly 1989; Coulter 1993). It has been suggested that the availability of public funding has stimulated the coming together of women's groups. Galligan (1998, p. 60) sees this as evidence that the state has responded to the flourishing of women's groups by identifying them as potential partners in the drive to economic development and the combatting of poverty, isolation and social exclusion. Hence the women's movement in Ireland has been an important agency for the mobilisation of women and the sensitisation of political elites to women's rights (Galligan 1998: 63).

1.5 Barriers and Facilitators to Gender Mainstreaming

It is possible to identify a number of barriers in the Irish case. These include the limited approach adopted and the fact that gender has more or less been subsumed under a much more general notion of equality.

In relation to the limited approach taken, it has been pointed out above that gender mainstreaming is limited to the expenditure and programmes contained in the national development plan. Moreover, there is a sense in which gender was added after rather than integrated into the plan from the outset. For example, the plan contains no explicit gender-related objectives, targets and appropriate timescales and no additional resources or areas of responsibility have been allocated. In addition, the emphasis is very much on the compilation of quantitative data on the situation of women and men in relation to specific policy areas to the neglect of broader, more qualitative issues. Finally there is little or no commitment to consulting groups affected and much of the monitoring information and progress reports remains confidential. Barry has concluded that without the requisite resources, the commitment to incorporate a gender mainstreaming approach into economic and social policy-making is likely to remain more theory than practice (2000, p. 16).

The second likely barrier identified is the fact that the focus in Ireland has shifted from gender equality to a much broader notion of equality. While it is too early to identify specific outcomes of this, it is likely that gender has been downgraded in the process.

In terms of facilitators, there are two important factors: social partnership and the existence of an interest in and a set of practices around policy proofing. As regards social partnership, while it is difficult to identify causality, it is noticeable that the national pacts and agreements have, since the inclusion of representatives of women's groups and the socially disadvantaged, become much more concerned about equality. In addition, it should be mentioned that it is in the social partnership institutions that one finds the most developed thinking on gender equality.

A second facilitator in the Irish case is the existence of the practice of policy proofing in general and equality proofing in particular. The broad origins of proofing lie in social partnership, one of the fruits of the model of social partnership followed in Ireland being a commitment by both the government and the social partners to the development of equality proofing and its integration with other existing forms of policy proofing, in particular poverty proofing (which has been carried out in the context of the National Anti-Poverty Strategy introduced 1997). Proofing is therefore at its most developed in the area of poverty. Research has also been commissioned, partly relating to gender proofing in the context of the Structural

Funds (2000-2006) and also on equality proofing in general. One of the latter studies (Mullally & Smith 2000) made recommendations on the nature and means of undertaking a suitable equality proofing policy and on the feasibility of a wide-ranging application of equality proofing given limited resources. So there is developing body of knowledge on proofing as an approach to policy in Ireland.

2.GENDER EQUALITY AND GENDER MAINSTREAMING IN SOCIAL PROTECTION AND TAX POLICIES

Ireland's social protection system has a number of particular features which are relevant from a gender perspective. Firstly, it is a two-tiered system in that means-tested or minimum income programmes are almost as important as social insurance for income maintenance purposes. As is the case elsewhere, men predominate among the recipients of the more generous social insurance programmes whereas women form the majority of those on social assistance. The differences are especially marked among pension recipients with the result that Irish women run the risk of poverty when they reach pension age. A related consequence of widespread social assistance is that many low-income women do not receive any benefit on their own right because the social assistance payment, being means tested and intended for the family as a whole, is made to the head of household. When it comes to taxation, while Irish arrangements in the past treated married couples as one unit and thereby promoted a male breadwinner model, there is a move now towards separate assessment and the tax system has become more neutral to married women's employment.

2.1 Treatment of Gender in Social Protection and Tax Policy

Traditionally, the Irish social protection system offered women financial support on the principle of compensating for the loss of a male income (Daly 1989; Yeates 1997). Founded on a strong male breadwinner model, the system treated women quite differently to men. The EU directives on social security, in particular Directive 79/7 which outlawed direct and indirect discrimination on the grounds of sex in regard to the main social insurance programmes, were hugely significant in the Irish context (Whyte 1988; Cousins 1994). Among other effects, EU regulations occasioned the abolition of discriminatory benefit conditions and of special benefit conditions which sometimes existed only for female claimants. They also served to redress the automatic classification of married women as dependants of their husbands and the exclusion of women from some benefits (or additions to benefits) (Whyte 1988).

Most of these measures took place in the late 1980s/early 1990s and since then there has been no major gender-related initiative taken in social protection.

The same is also true, although to a lesser extent, for income taxation. However, given Ireland's recent economic boom, some reform of the taxation system was seen to be necessary, primarily so as to encourage greater participation by women in the workforce. Hence during the 1990s, some moves were effected towards greater individualisation of income taxation, by the use of tax credits for example and giving married couples the choice of being assessed for tax separately or jointly.

2.2 Institutional Architecture and Policy-Making Processes

Social protection and taxation policy is highly centralised in Ireland, the former operated under the aegis of the Department of Social and Family Affairs and the latter by the Revenue Commissioners.

Traditionally, the government has exerted strong control over decision making and has been reluctant to open up the decision making process to other actors. However, social protection and taxation policy is a domain that has been a central issue in the social partnership process. Trade unions especially have seen it as their obligation to negotiate not just over wages but also over social security payment levels and taxation rates. In addition, the opening up (in 1997) of social partnership to representatives of women's interests and also those of the more vulnerable sectors of the population had, among other consequences, the effect of bringing social and income-related issues to the fore in the process of negotiating national agreements and pacts. Among the relevant issues raised were low pay, childcare and other relevant services, the effects of taxation arrangements on women's employment and payments levels for social welfare benefits.

There are no specific gender-related institutions in this domain.

2.3 Methods and Procedures for Mainstreaming Gender in Policies

The moves towards gender mainstreaming in this policy domain are very limited. There are two recent initiatives which are relevant here: the National Anti-Poverty Strategy and the recent 'social inclusion process' initiated by the EU.

In 1997 a major move was taken in Ireland towards reducing the country's high rates of poverty. The National Anti-Poverty Strategy was a broad-ranging initiative which, among other things, set out targets for reducing poverty and unemployment and in addition instituted new measures to combat educational disadvantage and deprivation in rural and urban areas. As well as setting targets, the National Anti-Poverty Strategy was significant in the Irish context for making poverty reduction a horizontal principle across policy areas (leading to significant institutional innovations) and also for introducing 'poverty proofing' of significant proposals for policy and expenditure as a way of mainstreaming a concern with poverty. At the present time mainstreaming is in Ireland at its most advanced in the domain of poverty. The National Anti-Poverty Strategy originally had no specific gender components or focus, even though there is evidence to suggest that poverty and income inequality are gendered phenomena in Ireland (Daly 1989; Nolan & Watson 1999). The up-dated Strategy produced in April 2002 is more gender-conscious however. It makes a stated commitment to gender proofing (as well as to render the poverty proofing process more effective) and also identifies women as a specific target group, stating the targets of reducing the proportion of women who are consistently poor to below 2% by 2007 and raising women's employment rate to an average of 60% or more (Government of Ireland 2002a).

The second relevant policy development is the National Action Plan on Social Inclusion, submitted by the Irish government to Brussels in July 2001 as part of the social inclusion process. The promotion of equality was one of the commitments made in the process and the degree of gender mainstreaming was one of the criteria according to which the national plans were evaluated by the European Commission. The Irish plan was disappointing from a gender perspective in that it contained no new initiatives. In its review of the Irish report, the Commission noted that gender was not mainstreamed and that crucial gender-related reform of the social security system, especially pensions and social insurance, was slow (European Commission 2001).

2.4 Key Actors Involved

The key actors involved in this domain of policy are the state and the social partners. There is no women- or gender-specific body or agency but the National Women's Council of Ireland has been active in lobbying on income-related issues. Historically in Ireland, women's low income and their relatively poor treatment in social protection were prominent issues in the

mobilisation of the women's movement. No particular lobby group or non-governmental organisation has developed around these aspects of policy as they affect women in Ireland.

2.5 Barriers and Facilitators

In terms of facilitators, there have been two main forces for positive change: the EU and the social partners. In regard to the first, it would be difficult to see the gender-related reforms that have been made in Ireland taking place in the absence of pressure from the EU. The directives on equality in social security and the significance placed by the EU on gender mainstreaming have been major facilitators in the Irish case (Whyte 1988; Cousins 1994). The second major influence has been the social partners. They have been especially responsible for raising gender as an issue in relation to the National Anti-Poverty Strategy and also for the general drive towards equality which is to be seen in Irish policy over the last five years.

In terms of barriers, the absence of a strong lobby groups on women's economic interests and the low priority being placed on gender issues in social protection and taxation policy are the factors most worthy of mention (Daly 1989; Keogh and Mangan 1989).

3. GENDER EQUALITY AND GENDER MAINSTREAMING IN EDUCATION POLICIES

The education system in Ireland is best described as a partnership between the state and the different churches, predominantly the Catholic Church. In this partnership the churches have traditionally exerted a large amount of power and influence over education.

The question of gender has been an important subject of research on education in Ireland. Two studies are especially relevant in this context. The first is a study of the effects of co-education on girls (Hannan et al 1996) and the second a study of the hidden curriculum in Irish second-level schools (Lynch 1989). Both studies point to a possible link between gender inequalities in Irish education and the fact that education has been to a large extent controlled by the churches.

Since the 1980s, however, the Department of Education has been implementing a variety of positive action measures aimed at redressing gender inequalities in the Irish education system. Gender mainstreaming strategies, on the contrary, are still at a very early stage although there are currently some moves towards the integration of a gender perspective into the field of education. The most significant of these moves is the establishment, in 2001, of a dedicated gender equality unit within the Department of Education and Science. The main activities of this Unit include, apart from positive action programmes addressing gender inequalities in education, measures aimed at incorporating a gender equality perspective in education policy such as promoting the participation of women in decision-making and the compilation of gender disaggregated statistics in the area of education.

3.1 Treatment of Gender in the Policy Content

There are four levels of education in Ireland: primary, second-level, third-level and adult education.

Education policy as it is officially stated does have a strong focus on equality in general rather than gender inequality in particular. In line with the move towards a general conception of equality described earlier, one of the stated goals of the Department of Education and Science is 'to promote equity and inclusion'. This goal is underpinned by the Education Act, 1998, which explicitly states as one of its main objects the promotion of equality of access and participation in education and of the means whereby students may benefit from education.

This Act, with its focus on equality, provides the legislative framework for all new developments in education policy. For example, in line with this new legislation the recently revised primary school curriculum incorporates an equality perspective throughout. While there is a strong focus on equality in general, education policy documents in Ireland right across the four levels do not generally include a specific gender analysis. Neither do they contain proposals that recognise the gender-specific situation and needs in education. One important exception is the 1995 White Paper on education 'Charting our Education Future', which provides a policy framework for the future of education in Ireland. The Paper contains a specific commitment to gender equality, particularly in second- and third-level education. It also identifies gender equality as one of the priority areas for career development of teachers.

In recent years, a number of significant activities have been undertaken to target gender inequalities in the curriculum. The following have been the most noteworthy:

- **Futures Programme** - This is a programme providing teachers with materials and resources and incorporates activities to raise awareness of gender issues into the syllabus of different subjects. The programme began as a pilot project in four post primary schools during the academic years 1987/1988 and 1988/1989. In the programme evaluation report, published in 1989, it was recommended that the programme should be widely disseminated. During the 1990/91 academic year, eighteen schools participated in the project. A field officer was employed on a part-time basis to assist in the dissemination operation.
- **Exploring Sex Stereotyping** - The aim of this programme, introduced in 1994, was to address the issue of gender stereotyping. It comprised a video supported by teaching materials for second-level students. The pack was funded and distributed by the Department of Education. It was produced as part of the activity of the Irish Advisory Group of the European Commission Network on Diversification of Vocational Choice for Young and Adult Women (working to promote the actions recommended by the Medium Term Community Programme on Equal Opportunities for Women).
- **Balance: Who Cares?** - This is a module for use in second level schools. The project, which was launched in 1997, was jointly funded by the Departments of Education in Belgium, Ireland and the Netherlands, together with the European Commission. While 'Futures' was designed to be used in a wide range of subjects in junior cycle, 'Balance' is more concerned with personal and social development. The module was designed for use with co-educational groups between the ages of fifteen to eighteen years.
- **Exploring Masculinities** - This is a programme of personal and social development for transition year and senior cycle boys. Launched in the year 2000, it focuses on the diversity of forms which masculinity can take, helping young people to explore this diversity. The project is a joint initiative between the Department of Education and the Association of Secondary Teachers. It received assistance from the European Social Fund.
- **Gender Matters** - This is a resource package, consisting of a manual and video, which incorporate activities to raise awareness of gender issues among teachers. The materials are intended for use for in-career development programmes with primary teachers.

Another programme worthy of mention is the Women into Educational Management programme. This is a pilot training programme designed specifically to initiate a process with a view to increasing the role of women in educational leadership. The programme, funded by the Department of Education and Science, was offered in 1997 and 1998.

3.2 Institutional Architecture and Policy-Making Processes

The Department of Education and Science has made a commitment to integrate a gender perspective into all aspects of the education system (Government of Ireland 2002b).

Under the national development plan technical assistance has been provided to the Department of Education and Science to fund a dedicated gender equality unit to co-ordinate and monitor the process of mainstreaming a gender perspective into all areas of the educational system. The Gender Equality Unit has a budget of €25.5 million for the period of the national plan (2000-2006). Priority areas of work already identified include the establishment of higher education networks and action to ensure that disadvantaged women are encouraged to participate in all training and education programmes.

Apart from this, the Equality for Women Measure, a funding programme under the national development plan, allocates €23 million to the Department of Justice, Equality and Law Reform to promote equality for women. Under this measure a number of projects have been set up aiming, among other things, at the promotion of women's access to all levels and areas of education and the promotion of gender balance in decision-making in educational and research institutions.

3.3 Methods and Procedures for Mainstreaming Gender in Policies

Apart from making a commitment to integrate a gender perspective into the education system, the Department of Education and Science has taken other steps towards putting in place a number of gender mainstreaming methods and procedures. One relevant move is the collection of a comprehensive data set on educational participation disaggregated by gender. This facilitates the identification of monitoring indicators and quantitative targets although as far as is known they have not to date been used for this purpose.

It is relevant in this context to mention a number of initiatives taken by the Gender Equality Unit, although they are still at an early stage. First, the Unit has worked with the Equality Commission to introduce guidelines on equality to be distributed to all schools. Secondly, the Unit is working together with school development teams (which are in charge of publishing school development plans annually) to make them aware of gender equality issues in the drafting of such plans. Thirdly, and as indicated above, the Unit is involved in a compilation of disaggregated education statistics, to be published later this year. Fourthly, the Unit provides a number of grants for research on gender and education.

3.4 Key Actors Involved

As indicated, the principal actors in the educational arena in Ireland are the state and the churches. Most primary and second-level schools are denominational. Ownership and day-to-day administration of these schools is under church control. Many education staff are employed by school boards of management that have a strong representation of religious interests. Church influence is not, however, confined to the administrative sphere. The churches also represent by far the largest formally recognised lobby group. Thus, they are strongly represented on all decision-making and consultative bodies set up by the education minister (Drudy & Lynch 1993, p. 79). Apart from this, the church also exerts influence by virtue of the fact that some education of primary teachers takes place in institutions run by religious orders.

In recent years a new interest group has emerged, the national lobby group of parents. This, together with trade unions representing teachers, has been very active in discourses around and policy on education.

There are no specific gender-relevant actors.

3.5 Barriers and Facilitators

One main barrier to gender mainstreaming in Ireland is the entrenched position of the Catholic church. The church's conservative ethos with respect to women and men and their different roles in society is a key issue. One effect of a strong tradition of religious involvement in education has been the persistence of a significant measure of single sex education in comparison to other European countries. Although today the majority of girls and boys in Ireland are educated in co-educational schools, the number of students educated in such schools is still significantly lower than it is elsewhere. This is especially the case for girls (Smyth & Hannan 1997, p. 13).

Apart from this, there is evidence that the churches in Ireland have exercised important control over the ethos or hidden curriculum of schools (Lynch 1989). In a national study of second-level schools, Lynch (1989) found that while girls' schools had a strong academic focus, they also emphasised the development of qualities such as caring, sincerity, gentleness and refinement. In contrast, boys' schools concentrated on progress and achievement either in the sporting or academic fields. Lynch also found that girls' schools emphasised the development of self-discipline or self-control whereas those for boys placed a high priority on the development of motor skills and physical ability.

However, on the positive side, one must make mention of the process associated with the national development plan which serves to provide an opportunity to integrate a gender equality perspective into a number of areas covered by the plan. The establishment of the Gender Equality Unit at the Department of Education and Science is one outcome. In addition, the recent equality legislation is giving an impulse to the introduction of gender mainstreaming into the education system. The Equal Status Act is very relevant here, since it covers access to services, including education services.

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List of Centres of Competence and Expertise

National Women's Council of Ireland: www.nwci.ie

National Social and Economic Forum: www.nesf.ie

National Social and Economic Council: www.nesc.ie

Equality Authority: www.equality.ie

Economic and Social Research Institute: www.esri.ie

Gender Equality Unit - National Development Plan (Department of Justice, Equality and Law Reform): www.ndpgenderequality.ie

Equality Studies Centre – University College Dublin: www.ucd.ie

Centre for Gender and Women's Studies – Trinity College Dublin: www.tcd.ie/womens_studies/index.html

**EQUAPOL: Gender Sensitive and Women Friendly Public Policies: A
Comparative Analysis of Their Progress and Impact**

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LITHUANIA: STATE OF THE ART REPORT

Deliverable Number 1

Assoc.prof. Meilute Taljunaite,

Ieva Govedaite

Law University of Lithuania

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1. NATIONAL POLICY FRAMEWORK ON GENDER EQUALITY AND GENDER MAINSTREAMING

1.1 General Background

1.1.1 Tradition of the Equal Rights and Opportunities in Lithuania

Lithuanian women can be proud of their equal rights' traditions. According to Lithuanian Statutes (1529, 1566, 1588), which were in force till 1840, female nobles had no political rights. Nevertheless they had equal economic and social rights in the modern sense. This historical fact is often used by state authorities to demonstrate a profound tradition of equality between men and women in Lithuania. In pre-Second World War Lithuania, the conditions were not favourable for the spreading of liberal ideas, as was the case in most of the States formed after World War I. After the overthrow in 1926, the authoritarian regime, which limited political and civil rights, was established.

The Constitution (1938) declared citizens equal before the law and prohibited the restriction of citizen's rights on the basis of religion and nationality (Art. 18), but not on the basis of sex. Woman's equal rights were not mentioned even in the article related to the family (Art. 34). Undoubtedly, these articles of the Constitution reflected the actual situation of women in the society, whereby the supremacy of Catholic Church and its privileged position hampered the adoption of ideas of equality between women and men.

In 1940 Lithuania was incorporated into the USSR. Lithuanian women became part of "liberated" soviet women during the Stalinist regime, which deprived all citizens of the USSR of their civil and economic rights, in opposition to the ideological propaganda. The new social order was secured by the Constitution (1940), which generally was a copy of the Soviet Constitution (1936). Women's "rights" were expressed as a duty to work, and as a duty of motherhood. Simultaneously, a social system of motherhood protection - maternity leave, workplace nurseries and kindergartens, extra safety working conditions for pregnant women etc. - was developed. Thus, despite the fact that the 'legislation' ensured the maximum of state intervention into private life, the new social order was more favourable to women than in the period of pre-war independence. Moreover, as Soviet legislation required the full employment of the population, there was no option "not to work"; even women with children would never be accused of 'parasitism' in this case. The Constitution of developed socialism (1978) also secured equal citizens' rights before law (Art. 32) and emphasized equal women and men's rights. It ensured them by providing equal access to education, equal opportunities in employment, by special labour and health protection measures for women, by legal protection, and material and moral support for mothers and children (Art. 35).

In the former Soviet period the equality of sexes was taken for granted. It was supported by the Constitution and by laws. But unfortunately this equality existed *de jure* only. In short, the situation of women can be characterised in the following way: the absolute majority of women were working for pay and were caring for their families. At the same time patriarchal attitudes were predominant in society. They were nurtured by Soviet ideology and enforced by the Catholic Church. Attitudes of that time were traditional: patriarchal towards the family, women's procreative obligation, women's role in labour market, and children's obligations to their parents (Purvaneckiene, 1993). The majority of these attitudes were unrealistic. They could not be implemented, and they only complicated women's as well as men's lives.

The Constitution of the Republic of Lithuania (1992) also proclaims equality of all people before the law and banning of restriction of individual rights (Art. 29). At the same time the article ensuring that women and men have equal rights as well as equal access and

opportunities is absent in the Constitution. However, with Lithuania's entry into the European Union, western standards with regard to women's status in society should be followed. In order for the principle of gender equality laid down in the Constitution to be fully guaranteed, the Law on Equal Opportunities of the Republic of Lithuania was passed. In compliance with the EU recommendations and guidelines on the issues related to equal opportunities, the Law on Equal Opportunities for women and men was adopted on December 1 1998 and came into force on March 1 1999, becoming the first one of this kind in the whole region of Central and Eastern Europe.

Lithuania has ratified the Convention on Human Rights and Fundamental Freedoms, and also, on February 17 1994, the Convention on Elimination of All Forms of Discrimination Against Women (CEDAW). The Lithuanian Government approved the Program for the Advancement of the Women on November 8 1996. At the same time, it has adopted many international protocols for the protection of human rights, such as the Conventions of the International Organization of Labour (ILO) and UNESCO, including the Convention for Equal Pay to Men and Women for Equal Work and the Convention for Elimination of Discrimination at Work and Professional Activities, etc. Being a Member of the Council of Europe and an Applicant country to the European Union, Lithuania follows the instruments of the Council of Europe and is in the process of bringing its national legislation into line with the EU Acquis.

1.1.2 Periods of Lithuanian gender equality trajectory in 1990-2000

There have been two distinct periods in the Lithuanian equality trajectory during the ten years after the reestablishment of Lithuanian independence in 1990.

The first period was in early 1990s and more or less coincided with Lithuanian's social movements towards independence. During this period, only the briefest note about gender issues ever appeared in the news. Women were called to stay home and to keep care of their children. Various positive actions in the new Lithuanian social policy were introduced with this aim in mind. Family and children (not women) were seen as the main social subjects. Many women experienced violence in the family and in society. However, most of the Lithuanian population (men and women) do not acknowledge this, and think that this is the way things should be (a few surveys have described these attitudes rather well: Purvaneckiene, 1996, 1997, 2001). The main reason for this is a limited knowledge of rights and traditional patriarchal social views. These traditional views were inadequate for the situation, since they were characteristic of Soviet ideology. Social opinion wanted to "return women to the family" without letting them choose their own way of life and disregarding the fact that economic conditions forced most women to work. Some state officials also wanted to close pre-school institutions, even though, in practice, most mothers had to work.

The second phase occurred in the mid-1990s. Only in recent years, gender inequality and women's problems have been discussed far more often than during the first years of independence. Changes in public opinion can also be identified, and there are fewer and fewer voices urging society to 'close' women off in the family. Many factors influenced these changes. The reality of life has helped society to get rid of an idealisation of the family unit, which portrays the model of man-provider and woman-housewife. The number of women's organisations has grown; they have also increased in strength and have done a great deal in terms of education. The European Union's standards and international initiatives have forced the government to consider the situation. The most important thing is that women elected to the Seimas (Parliament) work actively to help solve the problem of equal rights and other problems which women face. One of the greatest achievements of this group is the adoption of a Law on Equal Opportunities.

Laws on equal opportunities for men and women exist in various forms in many countries. The first such law in Central and Eastern Europe was adopted in Lithuania (Purvaneckiene, 1999). Amendments of other laws pertaining to it were also adopted. Women's organizations spoke about the necessity for such a law for the first time back in 1992. With support from the United Nations Development Program in Lithuania, the first project of equal opportunities law was prepared in 1995. It took three years of work, however, before the final law was accomplished.

The Law on Equal Opportunities of the Republic of Lithuania is first of all the result of the active work done by public women organisations. Arguments for a law on gender equality, which were discussed at a number of conferences and seminars, were difficult to get on the agenda of state officials. One of the main reasons for this was the attitude of state officials that gender equality is already guaranteed by other legal acts. One of the motives was also the fact that a number of laws and supplemental acts, especially those relating to labour relations, grant more benefits to women than men. In fact, the situation in Lithuania was not worse than in neighbouring countries, actually even better in most of the cases. Nevertheless gender discrimination, when seeking a job, negotiating a salary, studying or in other situations, does occur.

1.2 Institutional architecture

1.2.1 Equal Opportunities Ombudsman

In line with the Law on Equal Opportunities, the office of an Equal Opportunities Ombudsman was established. On 20 April 1999, in order for the Law to work properly and to guarantee the implementation of its requirements, the Seimas of the Republic of Lithuania appointed the Equal Opportunities Ombudsman. On 25 May the Office of the Equal Opportunities Ombudsman was instituted and its Statute passed. The Office is an independent public institution, having its own competence and accountable only to the Seimas.

As it is laid down in the Law, every person who thinks that a discriminatory act has been directed against him or her, or that he or she has become the subject of sexual harassment, has a right to appeal to the Equal Opportunities Ombudsman. Upon the completion of the investigation, the Ombudsman may decide to refer the case to investigative bodies, to impose administrative sanctions or dismiss the complaint. It has to be mentioned that the money deriving from the imposed administrative sanctions go to the state budget and not the victim. The reason for this is the desire to prevent the possible abuse of the Law, in pursuing personal benefit. It must be noted that the clear restriction in the Law does not allow the appliance of its provisions to family and private life.

1.2.2 Office on Women's Issues in Government

Concerning institutional structures, Lithuania set up an Office on Women's Issues in Government. In 1994, the position of State Counsellor on Women's Issues was established. Currently, the State Counsellor on Foreign Relations and Relations with NGOs is responsible for these issues.

After having regained its independence, Lithuania took part for the first time in the Fourth World Conference on Women (in Beijing, 1995). It was this conference that inspired the creation of the National Action Plan for the Advancement of Women, approved by the government in November 1996. Lithuania was one of the first countries in Central and Eastern Europe to take this step.

Nevertheless, the implementation of this plan has faced difficulties, because the government did not foresee funding for this process. The new government that emerged after the elections

in 1996 adopted a Plan of Action, and provided funding for some parts of it. This plan is being realised through the co-operation of governmental and non-governmental organisations. Positions with responsibility for gender issues have been created in the Ministry of Social Security and Labour and the Department of Statistics. The Ministry of Social Security and Labour formed an inter-ministerial commission for the monitoring of the implementation of the Action Plan for the Advancement of Women. The parts of the plan that pertain to changes in the law and to education are being implemented most successfully.

1.3 Methods and procedures for mainstreaming gender into public policies

1.3.1 Sex-disaggregated statistics

Lithuania is developing statistical databases that conform to the FRASCATI Manual and EUROSTAT conventions. The national statistical profiles are rich data sources on the position of women in various spheres. They show how sex-segregation is a feature of various patterns in the country. The statistical basis of research and development and social policy is not poor, but often there are no detailed requests for statistics that would establish the use of internationally accepted indicators in education or social policy.

1.3.2 Gender Studies

Gender Studies is an important research area to create a better understanding of the complexities and subtleties of both direct, but more particularly indirect and institutionalised, discrimination. Through gender studies both national and international networks on gender research were established. A Women's Studies Centre was established at Vilnius University in 1992. Later similar Centres were established in various other universities, and a few courses about gender issues were implemented. The centres are the basis for various research projects and publications, including the Journal "Feminism, Society, Culture" (on Lithuanian language, was established in 2001) (Stundziene, 2001, p.236-239).

1.3.3 "Bottom up" model of political change

Measures to facilitate women's professional-family life balance and programmes targeted at women at local level have opted for a radical "bottom up" model of gender mainstreaming. An example is the "The Project with the Swedish and Lithuanian Municipal Associations", the preliminary work on which has already been carried out. Under this project, which involves several municipalities selected in Lithuania, studies will be undertaken to help to formulate a gender equality policy in the regions. The project will not only help to look rationally at the existing situation but also to formulate a more active state equality policy at the periphery. The project's foundation, i.e. the "3 R's" (i.e. Representation, Resources, and Realia), will be studied in the Lithuanian municipalities selected. The project's partners are the Office of the Equal Opportunities Ombudsman, the Swedish Municipal Association and the Lithuanian Municipal Association.

1.3.4 Courts and legislation

Gender mainstreaming tools include legislation. Lithuanian lawyers (Vidrinskaite, 2001) are concerned with the defence of human rights, including ways to ensure implementation of the equal rights of women and men guaranteed in the international human rights instruments and in the Constitution and other laws of the Republic of Lithuania. Every person has a right to appeal to the court, if his or her rights are violated. The law provides for compensation if a victim of sex discrimination appeals to the courts. But few women go to court.

1.4 Key non-Governmental actors

1.4.1 Women's NGOs

The number of NGOs related to women's issues has recently been increasing. These NGOs are gaining momentum and becoming more and more important to society. In the last couple of years, the establishment of local NGOs has been more prevalent.

According to the data from the Lithuania's Women's Information Centre, there were 63 women's NGOs on January 1, 1999 in Lithuania. Not all are registered with the Ministry of Justice or at municipalities. Some do not even need to be registered, as they are subdivisions of international organisations or at the universities. Many of the NGOs are established as interest groups. The membership of Lithuanian women's organisations varies greatly, some of them uniting 9 members and others up to as many as 10,000 members. They can be divided into three groups:

- Party-affiliated organisations
- Organisations which in their aims include the protection of women's rights and/or advancement of women
- Women's organisations established as interest, support or national groups.

There is no umbrella organisation encompassing all women's organisations in Lithuania. The Lithuanian Women's Association embraces 12 member organisations. Eighteen women's organisations partake in the activities of its co-ordinating council, founded in the autumn of 1998.

The Women's Issues Information Centre (WIIC) works as a mediator in collaboration with all the women's organisations in the country. Its aims are "to change the attitudes of a patriarchal society toward the place and role of women in society; strengthen women's self-confidence; strive for equal gender rights, responsibilities and opportunities in life". WIIC activities are educational, training, information and publishing.

1.4.2 Coalition of Non-Governmental Organisations for the Protection of Women's Rights

In May 2000 at a conference organised by the Office of the Equal Opportunities Ombudsman, "On the Path to Equality and Partnership", a general resolution was passed proposing "to found an association or some other organisation, which would unite non-governmental women's organisations and direct them for the realisation of rights and opportunities in all areas of state and public life as well as to make the work performed by these more effective and defined."

At the initiative of the Social Initiative Fund, the Coalition of Non-Governmental Organisations was founded to protect women's rights. Its aims will be implemented through women's discussion clubs in the Lithuanian counties. The Coalition is a bridge between the discussion clubs, in which women can raise problems that concern them and suggest ways to solve them, and the Coalition's social partners, i.e. Office of the Equal Opportunities Ombudsman and the Equal Opportunities Commission. The Office and Commission will be furnished with information about the real situation in Lithuania regarding the rights and opportunities of women.

1.4.3 Lithuanian Women's Party (renamed as the Party of the New Democracy) and Group of Women Parliamentarians

On the 25th of February 1995 the Lithuanian Women's Party was established (prof.K.Prunskiene was the leader of the party). The primary concern of the Party was the

status of women. The Party invited all women to unite and participate in solving urgent problems facing society. However, membership was open to both sexes. The Programme of the Women's Party included a sub-programme on the status of women. Soon after the latest elections to the parliament in 2000 the Women's party was renamed as the New Democracy Party.

After the parliamentary elections in 1996, significantly more women became Members of Parliament and they have united to form a Group of Women Parliamentarians. There were four party-affiliated organisations in the mid-1990s. Within their political parties, the most successful group has been the Social Democratic Women's Union of Lithuania. A 20 per cent quota on women in all elected bodies and election lists of the party was introduced in the Social Democratic Party.

1.4.4 Lithuanian Trade Union Confederation Women's Centre

The Lithuanian Trade Union Confederation Women's Centre was established on 12th June 2002 to coordinate on the confederation level activities of women's branch organisations. This Women's Centre is affiliated to ICFTU Women's Committee. It cooperates and exchanges work experience with Lithuanian NGOs and foreign trade union organisations. The aims are to unite women-trade union members, involve women in trade union activities and represent women's rights, with the aim of achieving equal opportunities in work, society, politics, and family. The Lithuanian Trade Union Confederation Women's Centre's activities are: education, training, consultation, information and producing material.

1.5 Barriers and facilitators to gender mainstreaming in public policies

1.5.1 International Social Partners and International Conferences held in the country

UNDP, PHARE and the Open Society Fund–LITHUANIA can be identified as the main social partners supporting and encouraging various projects and programmes in Lithuania, including on women's issues. The financial support received from the United Nations Development Programme was a real impetus for the initiators of the Law on Equal Opportunities of the Republic of Lithuania. Even though the first two drafts of the Law were strongly criticised, they still encouraged active discussions among public organisations as well as decision-makers and lawyers.

The first Human Development Report on Lithuania, which was prepared with the help of the United Nations Development Programme in 1995, was the first attempt to provide a complete analysis of the social situation of Lithuanian people (Human Development Report on Lithuania 1995). Similar reports have been prepared each year. Chapters on gender equality and on women in Lithuania are sometimes presented in these reports.

A few important non-Governmental events have had an important influence on gender mainstreaming in the country, because high level public awareness conferences created a dialogue between policy makers, researchers and NGOs:

- On May 11-13 2000, the Lithuanian Government, Women Information Centre and UN Development Programme organised a conference of the Baltic States "Five years after Peking conference: achievements and perspectives". One of the conclusions of this conference was that issues of both sexes are not fully understood in Lithuania.
- The Second Conference on "Women and Democracy, Reykjavik – Vilnius" was held in Vilnius on 15-17 June 2001. The Vilnius Conference extended invitations to the representatives of Poland, Germany, Nordic Council and Nordic Council of Ministers. The 1999 Reykjavik Conference "Women and Democracy" entrusted Lithuania to

welcome guests from five Nordic states, three Baltic States, the USA, Russia and Belarus. The Conference facilitated more active cooperation among the participating countries in dealing with issues of equal opportunities for men and women, initiated new international projects, promoted closer cooperation among non-governmental organisations and attracted more attention to equal opportunities for men and women in contemporary democratic society.

1.5.2 Patriarchal stereotypes

The first thing that prevents a more active role by women in policy is the strength of patriarchal stereotypes (Alisauskiene, 1995; Kanapiene, Juozeliuniene, 1996). Today it is commonly recognised that the practice of legal “equal rights” does not eliminate a gender-structured society, and patriarchal stereotypes in regard to male and female roles remain strong.

Nearly 90% of polled males and females in June 1994 during a survey on “Women In Lithuanian Society” (Lithuanian Human Development Report 1995) said they had not suffered sex discrimination. Does this indicate that there is no sex discrimination, or simply that most people accept it as a normal part of life?

Violations of the principle of gender equality do occur. They can be separated into two types: open and hidden. The first type is apparent in acceptance regulations for universities and colleges of higher education (women researches are grossly under-represented in many scientific fields and in higher university positions in Lithuania, Taljunaite, Zvinkliene, 2001) and job adverts in the mass media, which often stipulate the sex, age and family status of desired applicants. The second type is most apparent when sex discrimination comes to light in labour relations or in educational institutions, when employees or students of one sex are discriminated against but other reasons are cited.

1.5.3 Attitudes towards women in politics

According to public opinion surveys of Lithuanian citizens, Lithuanian citizens believe that women’s participation in politics is very limited (Alisauskiene 1995). The majority of citizens (both women and men) do not think that it is a problem, according to data from the same survey. However, female politicians believe that this is not good. So opinions from “outside” and “inside” are different. What may be the reasons for such a situation? Firstly, women’s limited involvement in policy-making is a result of a specific social and psychological context of historically rooted and widely spread patriarchal stereotypes. Social norms differentiate men and women’s social roles. For Lithuanian citizens it is natural that men are the breadwinners, dominate in taking strategic decisions and have the role of active social citizen. Women take care of the family and house keeping, and are not socially active.

1.5.4 Socio-economic difficulties in everyday life

The economic situation is also a major burden on women nowadays. Rapid changes in society have disintegrated old social relations and social problems become more severe. Because of the traditional stereotypes of women and men’s roles, more women than men have lost their job. They also often take care of solving problems of their family’s budget (Hernes G., K.Knudsen, 1991, Everyday life in the Baltic States, 1997).

So most women do not have money and time to be more active in decision-making. Also the motivation to be involved in politics is getting less and less. Moreover the reforms of the system are not supporting infrastructure development. This means that there are few services that could reduce the burden on women of the traditional division of roles.

2. GENDER EQUALITY AND GENDER MAINSTREAMING IN SOCIAL PROTECTION AND TAX POLICIES

The provisions of article 3 of the Law on Equal Opportunities of the Republic of Lithuania oblige public authorities, according to their competences, to assure that the equal rights of women and men are strengthened in all the legal acts being prepared and passed. It also prescribes that these institutions must prepare and implement programme regulations so that one sex is not superior to another.

Towards this end, the Committees on Human Rights, Law and Order, Social Affairs and Labour as well as Family and Children's Affairs Commission of the Seimas of the Republic of Lithuania were contacted in order to prepare corresponding amendments to the laws of the Republic of Lithuania.

Today's crucial market reforms (privatisation, the liberalisation of foreign trade and the reduction of subsidies for goods and services) are producing social results that are not characteristic of a planned economy. Under market conditions, work becomes the principal means of guaranteeing an individual's social security. An individual must rely upon him/herself to determine his or her social status, as well as that of his or her family.

Significant efforts were made in preparing for integration into the European Union and for collaboration with the European Council. In 1997, Lithuania signed the European Social Charter and ratified it. Lithuania also ratified the European interim agreements on social security schemes relating to old age, disability, survivors and other schemes.

In 1991 the Law on State Insurance was established. The foundations of a new social security system laid down in 1991, and the pensions reforms outlined in 1994/95, continued to be developed and applied. The sustainable development of a social security system could be considered a prerequisite for its reliability and stability, although it also raises the danger of the 'ongoing' development of certain negative trends. Among such trends the most noticeable are: a growing deficit in social insurance, more extensive rather than intensive expansion of social assistance, and renewed efforts to create social security privileges for certain population groups (Lithuanian Human Development Report 1999, p.85).

A recent very important event in the social security sector was the approval in mid-1999 of the legislation on pension funds. This law legalised the means for establishing and operating pension funds, and opened the way for dividing responsibility for pensions insurance between the state and the private sector.

2.1 Treatment of gender in the policy content

The basic goal of former Soviet family policy was to assist families in raising their children and to guarantee the employment of women in industry. Employers bore total responsibility for the social guarantees of working mothers.

In June 2000, the Lithuanian delegation went to the United States to present the first and second periodic reports of the Republic of Lithuania in accordance with article 18 of the Convention for the Abolishment of All Forms of Discrimination Against Women. The Equal Opportunities Ombudsman, Aušrine Burneikiene, Seimas member Roma Dovydeniene, Head of the Permanent Mission to the United States Gediminas Šerkšnys, and other officials represented Lithuania in the United Nations session that took place in New York. In delivering his report, Lithuanian representative Gediminas Šerkšnys informed the United Nations Committee for the Abolishment of Discrimination against Women that the guarantee of equal opportunities for women and men is a state policy priority.

The Committee's concern was expressed that the activities of the Republic of Lithuania in certain areas are insufficient: 1) in assuring equal opportunities for rural inhabitants and older women as well as in improving their position; 2) in realising health care; 3) in supporting non-governmental organisations concerned with women's issues; and 4) in improving the position of women in the labour market and elsewhere. The Lithuanian Government was prompted to prepare and implement corresponding education and public information programmes promoting non-stereotypical roles for women and men in all areas of public life. Attention was called to the problem of poverty amongst women (The Annual Report of The Office of the Equal Opportunities Ombudsman, 2001).

The process of drafting the new labour and social security legislation commenced upon reestablishment of independence in Lithuania. During the transition from a centralised economy to a market economy it became evident that it was necessary to develop new social security legislation. Social security reforms commenced in 1990 with the adoption of the Law on Social Provision. This law declared that the State Social Security system consists of compulsory social insurance and assistance with additional support from the State funds. The State Social Security system covers all persons residing in Lithuania who are in need of social assistance. Various positive actions in the new Lithuanian social policy were made for this aim, but family and children (not woman) are the main subjects. The state system for the support of families and children consists of two parts:

1. Non-means tested benefits for families:
2. Support to low-income families on a means-tested basis (Social Report – Lithuania 2001, p.34).

So that the rights of mothers and fathers would be made uniform in the areas of labour relations and the provision of social guarantees, the Office of the Equal Opportunities Ombudsman reviewed some of the laws of the Republic of Lithuania as well as Government resolutions. After evaluating the compliance of the corresponding legal acts regulating labour relations and the occupational safety of people to the Law on Equal Opportunities, it was observed that certain legal norms contradicted the requirements of the Law on Equal Opportunities. The provisions of the laws of the Republic of Lithuania and other legal acts granting privileges to mothers in the area of labour relations can be considered an example. Thus in order to make the position of women and men (as workers) uniform after the period of a woman's pregnancy, giving birth, and nursing, for which time the laws and resolutions have strengthened the corresponding privileges for women, these privileges and guarantees should be granted to not only women raising children but also to men, both those raising children alone and those doing so together with its mother. The parents, i.e. mother and father, of a young child should be identically protected and defended socially at work. That would help solve the problem of how much our society really comprehends the principle of sexual equality and what criteria should be followed in granting one of them priorities in various areas of public life and especially in the area of labour relations (The Annual Report of The Office of the Equal Opportunities Ombudsman, 2001).

Therefore, in preparing new legal acts regulating labour relations and public service as well as amending those already in force at this time, it was proposed to establish identical privileges and guarantees for women and men raising young children. In certain cases it is possible to foresee an alternative variant, for example, appropriate material guarantees could be established for either women or men raising young children.

Such proposals were in essence approved. The work group prepared and has currently already finished co-ordinating the drafts of the corresponding legal acts with the interested institutions. The proposals presented concerning amendments to the Law on State Benefits to Families Raising Children of the Republic of Lithuania were approved.

The Law pertaining to Holidays passed in 1991 significantly outlined equal rights for both father and mother in terms of childcare leave. The Law encompasses grandfather or grandmother and also includes any other person who is genuinely responsible for the child's care. However, fathers do not take advantage of these benefits except in rare circumstances. In the absolute majority of cases women take responsibility for care of the child.

There are many provisions to protect women employees, especially pregnant women and those with small children. Though a wide system of guarantees, gradually developed over recent years, exists, it is not particularly effective in the current market economy. Employers are aware of all these guarantees and they tend not to employ young women, especially in fields that require higher-level training costs. Even so, job vacancy advertisements in Lithuania are sometimes not gender neutral.

Laws passed in the last few years have now been revised based on the principles of gender equality. Implementation of these laws largely depends on the views, attitudes and desires of society as a whole.

Mandatory social insurance encompasses the largest proportion of the social security system. Its main goal is to totally or partially compensate for income lost due to old age, disability, sickness, maternity, loss of a breadwinner or unemployment.

2.2 Institutional architecture and policy-making processes

The administrative scheme of social protection policy decision-making and its implementation, in principle, is of following levels:

- Seimas (Parliament) (policy decisions, legislation)
- Government (policy approval)
- Ministries (policy formulation)
- Executive bodies (policy implementation)
- Councils or other bodies (supervision and counselling). Councils or other supervisory bodies are established at the Government, Ministries or at the Municipalities, that is, on different levels.

The Ministries of Social Security and Labour (MSSL) and Health (MH) are the main governmental institutions for setting social policy, responsible for the formulation, supervision of implementation and monitoring of social protection policy.

“The continuity of the state policy, consistent reforms and efficient administration shall be the guiding principles in the work of the 12th Government” are written in the Programme of the Government of the Republic of Lithuania for 2001-2004 (<http://www.lrv.lt>). The main social actors mentioned in this programme, in the first chapter about labour and social security, are Lithuanian citizens, “young people, long-term unemployed, the disabled, pre-pensioners, women, and different risk groups”. Family, children and youth are the highest priority in this Governmental Programme. Support for families, especially for those with many children, has been consistently intensified during the last years. To fully use every existing opportunity, the Plan of Equal Opportunities for Men and Women for 2001 – 2005, which is under new revision by the Government of the Republic of Lithuania, might place more stress on issues concerning women and social policy.

Social protection and taxation is highly centralized in Lithuania. The establishment of the Law on State Insurance was followed by the establishment of a separate State Social Insurance Fund (SoDRA) and State Social Insurance Board.

Social insurance is financed entirely in accordance with the pay-as-you-go principle (Study on the Social Protection Systems in the 13 CC). Social insurance contributions are the basic and most significant source of income of the State Social Insurance Fund. They account for 98 per cent of total income. The state budget is the solvency guarantee for the State Social Insurance Fund. Part of the State Social Insurance Fund budget is reallocated to Employment and Health Insurance funds.

The development of a tax system started with the most significant directly applied taxes (personal income tax and corporate profit tax), and moved to indirect taxes (value added, excise, and duty tax) (Lithuanian Human Development Report 1999, p.49). The present move is back to direct taxation (income, profit and property); because tax laws underwent many changes (particularly those on income and profit taxation adopted in 1991), they do not correspond to the current socio-economic situation and lack integrity, clarity and internal consistency. Further developments in the tax system are outlined in the programme for reforms in the legal foundation of the tax system, which was approved in 1998. This was the first document to present a systematised approach to taxation, to formulate principles for legislative reform, and to outline the key goals in the development of the tax system.

At the present time, Lithuania has 20 categories of taxes, duties and contributions. Prominent in their direct social designation are the state social insurance contributions (set in 1991) and the mandatory health insurance contributions (set in 1997, with the transition to a new insurance based financing of personal health care services). Tax revenue ends up in the state budget, local government budgets, the roads fund, the state insurance fund, and the mandatory health insurance fund. The country's tax revenue is growing constantly.

2.3 Methods and procedures for mainstreaming gender in the social protection policies

Overall, the social protection system in Lithuania is citizen-centred (Study on the Social Protection Systems in the 13 CC):

- There are several special schemes additional to the general social security system and benefits under these schemes are paid for “merited” people who did not earn insurance and do not need assistance;
- The social insurance system is constructed to ensure equalisation of non-insured persons to insured (e.g. maternity and maternity/paternity benefits are paid to both categories of citizens);
- Most social insurance schemes provide benefits to insured persons, but some of them are insured by the State (e.g. health insurance), or may have some privileges which are not associated with actual insurance payments and periods or market conditions (e.g. unemployment insurance);
- The indirect way to decrease social insurance obligations was to accelerate the increase in the retirement age: it has moved from 55 years to 65 years for women (as a current trend in policy making);
- Administration of social protection is highly centralised (Municipalities mainly implementing national social protection/assistance schemes), so citizens, i.e. the electorate, not contributors and taxpayers, govern political decisions.

2.4 Key actors involved

The key actor involved in this domain is the state.

2.5 Barriers and facilitators

Social insurance expenditure exceeded revenue in different years, and the budget deficit of the State Social Insurance Fund (SODRA) continued to grow. The difficult financial situation at SODRA has several causes, the most important of which is the worsening economic performance in the country.

Gender mainstreaming is non-existent in those policies, apparently because gender equality issues are not yet discussed, and relevant research does not exist in the country.

3. GENDER EQUALITY AND GENDER MAINSTREAMING IN EDUCATION POLICIES

Article 4 of the Law on Equal Opportunities establishes the duty of education establishments and research and higher education institutions to implement equal rights for women and men. According to part 1, paragraph 1 of the same article, “Education and research institutions must assure women and men identical conditions for acceptance into professional training establishments, colleges, and institutions of higher education.”

On the basis of the aforementioned article of the Law on Equal Opportunities and article 3, paragraph 1 of the regulations of the Office of the Equal Opportunities Ombudsman regulates the right of the Office “to inspect how education, research and higher education institutions are implementing the equal opportunities of women and men” as well as “to participate during examinations or acceptance into education establishments and research and higher education institutions with the rights of an observer”. The Office observes the acceptance of persons into colleges and higher education institutions (The Annual Report of The Office of the Equal Opportunities Ombudsman, 2001).

The Law on Education of the Republic of Lithuania was presented on June 25 1991. A few years later the Concept of Lithuanian Education Reform and General Programme Project was announced (in 1992-1994), which presents education reform objectives and priorities (available at <http://www.smm.lt>):

3.1 Treatment of gender in the policy content

The activities of science and higher education institutions are regulated by the new Law on science and higher education (2000 03 21, No. VIII-1586). Norwegian experts, who evaluated Lithuanian science in 1994 and 1995, as well as Lithuanian and PHARE experts in 1998, stated that despite poor financing and an outdated scientific research basis, (except for newer computers) the system of education in Lithuania may be the foundation for improving living conditions, and research of different disciplines corresponds to the international level.

All institutions of higher education as well as most of the colleges in Lithuania were sent written requests by the Ombudsman of Equal Opportunities to furnish broader information about the acceptance procedure at these institutions. Entrance examinations were not organised at most research institutions, i.e. applicants to the selected academic programmes were selected according to competition points, which were determined by certain assessments of the school leaving certificate and the final examinations. Such a procedure already automatically prevents discrimination due to sex because it does not create conditions to subjectively evaluate applicants. Obviously uniform requirements relating only to their general capabilities and school leaving results were applied to all the applicants. In observing the acceptance of students, no infractions of the Law on Equal Opportunities were identified.

Between 1993 and 2000 there was a noticeable increase in the number of young people seeking education at all levels in Lithuania. There is a noticeable tendency in Lithuania as in other Central and Eastern European countries to differentiate and to specialise training.

Girls tend to seek better education compared with boys. While in 1-9 grade of basic school the number of boys is 12 000 more than girls (95 girls per 100 boys). Beginning in the upper secondary level, the proportion of girls increases: in 9-12 grade the proportion of boys to girls is 100 to 135, in college type schools 188 and in higher schools 137, respectively. Boys are more inclined to become workers. In turn, the number of girls in vocational schools is declining: in 1994 there were 75 girls per 100 boys, while in 1998 there were 65 girls.

The major part of girls prefer to finish their education career after acquiring the diploma of higher education. As far as boys are concerned, they are apt to seek a higher degree: in 1998 the number of male postgraduates who acquired a Doctor's Degree was 93, while the number of girls was 78.

The difficulty of combining being a woman with higher education, together with disappointment about the financial benefits of higher education, could be among main reasons for the decrease in the proportion of women among students at the higher schools during the first years after the changes.

Percentage of female students at the higher schools

(as of the beginning of the academic year)

1985-1986	1990-1991	1995-1996	1998-1999
62.1	51.8	56.1	57.8

Calculated on the basis of Statistical Yearbook of Lithuania 1999, p.510

It can be seen from the table that there is a slight increase in the proportion of female students at higher schools during recent years. It could be related to recent changes with regard to higher education. According to job-offers, employers prefer to have well educated staff regardless of the field of activity of their enterprise.

Data about the sex of those submitting applications and enrolled in the school was also requested from the heads of colleges. Most colleges furnished data about the enrolment results. Unfortunately, a proportion of the colleges did not respond to the Office's letters. These heads will be cautioned. During the reporting period (i.e. 2001), no complaints were received about actions by education establishments and research and higher education institutions, which violated the equal opportunities of women and men (e.g. the establishment of different requirements and conditions for accepting women and men to train or study or when assessing the knowledge). Complaints were received about the heads of education and research institutions only as employers violating the provisions of the Law on Equal Opportunities.

It is possible to briefly describe the situation at the only institution of higher education in Lithuania, the Military Academy of Lithuania, where certain restrictions for women in the conditions to be accepted to study have been abolished. The General Jonas Žemaitis Military Academy of Lithuania changed the conditions for acceptance to study, granting women the possibility to study as well, in reaction to the decision of the Equal Opportunities Ombudsman that it should cease those actions violating the equal rights of candidates to study at the Military Academy.

3.2 Institutional architecture and policy-making processes

The *Ministry of Education and Science* is the main governmental institution setting educational and scientific policy for all levels of education. Private education is challenging the monopoly of state education institutions, and fosters competition. In 2000, four non-state university high schools were launched (there are 15 state universities). In these science and

high education institutions only four women hold director's position. There are 24 fellows in Lithuanian Science Council, two of them are women. If the overall ratio of female scientists is 45 percent, and in some science and high education institutions, depending on science branch, it fluctuates from 10 to 75 percent, there are only a few female scientists holding high positions within science administration structures. Therefore, in the Plan of Equal Opportunities for men and women for 2001 – 2005 measures are foreseen, which, based on recommendations of the European Commission, will result in preparation of proposals for science and high education institutions on the desirable ratio of representatives of both sexes within the institutions of sciences' administration.

The Lithuanian Science Council is in essence only an expert structure, dependent upon the Ministry of Education and Science and the Seimas (Parliament). Therefore budget allocations naturally go to individually strong projects or simply institutions, without reference to goals to develop certain economy branches or strive for other long-term objectives. The *Lithuanian Science Academy* also has the function of a science and education expert in its regulations. The Rectors' Conference represents higher education establishments, the Directors' Conference represents state science institutes, and there is an independent *Education Quality Evaluation Centre*. All these bodies do not have a specific policy for the promotion of gender equality/gender mainstreaming in higher education.

Unfortunately, in the country's real life, the goals and priorities of scientific and research politics are only declarations, and are not supported by resources or even by statistical data, or by industry and business development and innovations programmes. The activity of the only fund for financing scientific research – *the State Science and Higher Education Fund* – is not connected with the country's economic needs, so the efficiency of R&D does not have the importance and value needed for the state.

3.3 Methods and procedures for mainstreaming gender in policies

3.3.1 Main organisational tools

In many Lithuanian institutions of science and high education, the mechanism of open competitions for the positions of scientists still functions far from perfectly. In weaker institutions of science and high education the certification mechanism is practically not working, so that some doctors Habilis and professors hold posts of heads of divisions without any competition, and without any assessment of their age and work effectiveness. The Government of the Republic of Lithuania adopted laws, which regulate minimum qualification requirements for the teaching staff and researchers of the state science and high education institutions, as well as the rules for organising competitions to hold positions, certifying and conferment of pedagogical scientific titles in high schools. These laws are among the most important documents that would help to implement principles of equal opportunities within the structures of science and high education. There is the potential to promote gender equality through these laws but no any action has yet been taken.

3.3.2. Main financial tools

Lithuanian scientists by competition order may get the following financial support from the state:

- State Scholarship for Young Scientists, which is granted for scientists up to 35 years old;
- State Scholarship of the Highest Degree, granted to the distinctive scientists;

- Scholarships granted by Lithuanian State Research and High Education Fund, individual scientists, groups of scientists for various scientific projects and scientific publications;
- Support of international studies and scientific work abroad (travel expenses, per diem allowances, scholarships) according the signed agreements of cooperation in the fields of science and high education, provided by the Department of Science and High Education under Ministry of Education and Science.

At the present time, the Government of Lithuania is not able to establish additional scholarships for female scientists. However, only 25 percent of participants of the competitions for the above mentioned scholarships are women. To fully use every existing opportunity, the Plan of Equal Opportunities for Men and Women for 2001 – 2005 provides for the presentation of additional information to the institutions of science and high education about the male/female scientists ratio in the competitions and encourages the administration of the science and high education institutions to encourage female scientists to more actively seek for the above mentioned scholarships and achieve better scientific results.

It is also planned to prepare proposals for the Lithuanian State Fund of science and high education regarding financial support for groups of scientists, based on principles of sex balance and with regard to the ratio of scientist of both sexes participating in projects.

3.4 Key actors involved

The role of the school principal is changing, boards are being established and parent communities are becoming more active and gaining more influence.

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LIST OF CENTRES OF COMPETENCE

Governmental institutions:

1. Seimas of the Republic of Lithuania
 - Committee on Education, Science and Culture
Chairman of Committee: prof. R.Pavilionis
<http://www.lrs.lt>
 - Committee on Family and Children
Member of Committee: prof. G.Purvaneckiene
<http://www.lrs.lt>
 - Office of the Equal Opportunities Ombudsman
<http://www.lrs.lt>
2. Office of The Government of the Republic of Lithuania
Division of Education, Science and Culture
<http://www.vyriausybe.lt>
3. The Scientific Council of Lithuania
<http://www.lmt.lt>
4. Higher Education and Science of Lithuania
Department of Science and Higher Education of the Ministry Of Education and Science
<http://www.mokslas.lt>
5. Ministry of Social Affairs and Labour of Lithuania
<http://www.socmin.lt>

Women's Organizations and NGO's:

6. Women's Issues Information Centre
<http://www.undp.lt/wiic/>
7. Data Base of Women's Organizations in Lithuania:
<http://www.lygus.lt> (Lithuanian Women's Information Portal)
8. Center for Gender Studies at Vilnius University since 1992
<http://www.moterys.lt>
<http://www.vu.lt>

**EQUAPOL: Gender Sensitive and Women Friendly Public Policies:
A Comparative Analysis of Their Progress and Impact**

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SWEDEN: STATE OF THE ART REPORT

Deliverable Number 1

Mari Runardotter

Christina Mörtberg

Luleå University of Technology

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1. NATIONAL POLICY FRAMEWORK ON GENDER EQUALITY AND GENDER MAINSTREAMING

1.1 General background

The foundation of Swedish gender equality policies can be traced back to a rather intense gender equality, or sex role, debate in the 1960s, which to a large extent has affected the way Sweden views equality issues. Equality was, from this point of view, no longer only a question for women, since both women's and men's roles were discussed. The building of the welfare state and the shortage of labour also influenced the deployment of gender equality policies. Thus, women's employment became the fundamental element or the basic principle. Because of women's entrance into the labour market, their contribution as breadwinners caused the male role to be challenged, since men were also expected to be responsible for domestic work (Baude 1992, Bergqvist 2001, Fürst 1999, Fredriksson 1987). The focus of gender equality policies on paid work is the distinguishing feature of official Swedish policies, though it is also found in the other Nordic countries (Fürst 1999). This is also reflected in the Swedish gender equality legislation.

The creation of gender equality as a political area in the 1970s was based on the notion that gender equality was to be regarded as a common societal problem to be solved by common efforts within the political frame (Ds 2001:64). In 1972 the Swedish government established the first formal organisation – the Equal Opportunities Commission, responsible for gender equality issues. The commission's primary task was to strengthen women's position in the labour market and women's right to employment (Ds 2001:64, Fürst 1999). During 1972-1976 the delegation was placed directly under the prime minister's office, but the work with gender equality moved in 1976 to the Ministry of Labour and at the same time the commission ceased to exist. Instead a cabinet minister with responsibility for gender equality policies was appointed. In 1982 the government office founded the Division for Gender Equality, a unit whose task is to handle gender equality issues. It has been placed within different ministries during the years, but from 1998 it is located in the Ministry of Industry.

The most important reforms that aimed at achieving equality between women and men (besides the general and equal right to vote) are to be found in labour market, family and social policies. The three reforms decisive for the path chosen by Swedish politicians are (Fürst 1999, Westerberg 1998):

- individual taxation,
- parental insurance, and finally
- the decision to expand the child care system. Today the law states that every municipality has an obligation to provide care for children from the age of one for parents who so wish.

Sweden is a state with great governmental responsibility for social security and social service and this leads indirectly to gender equality through social insurance, since the benefits are general and intended for the individual (Sundgren Grinups 1998). The parental insurance, for example, gives economic compensation for salary reduction while a parent stays at home to take care of their children. Furthermore, the allowance for the time a parent stays at home with his or her child is a pensionable income, or, in other words, these years are included (Westerberg 1998).

During the 1970s several voices were raised about legislation aiming at gender equality in the labour market, something the trade unions and the employers rejected. In 1977 the parties of the labour market made an agreement about gender equality in order to avoid legislation and

to show that gender equality issues can be solved by agreements, like other labour judicial questions. However, in 1980 the first Equal Opportunities Act (SFS 1991:433) was passed and there was legislation in Sweden against gender discrimination in the labour market (Ds 2001:64). The act clearly aims at improving women's situation in working life and it has over the years been made more stringent, developed and adjusted to EU rules regarding equality and prohibition against discrimination. At the same time, or as a consequence of legislation, the Equal Opportunities Ombudsman, JämO, was established in 1980, a public authority with the aim of supervising how the Act is to be followed. From March 1st 2002 JämO's responsibility has been extended also to overseeing the equal rights of students in higher education. During the 1980s the work with gender equality in Sweden continued with an official evaluation (SOU 1987:19) whose aim was to propose actions that would increase women's participation in, among other things, governmental boards of directors and committees. The intention was to ensure that every other position was reserved for women.

Today gender equality is prioritised in Sweden, with the overall objective that women and men should have the same opportunities, rights and obligations within all essential areas in life (Skr 1999/2000:24). This includes among other things:

- an even distribution of power and influence
- equal opportunities for economic independence
- equal opportunities and conditions regarding enterprises (businesses), work, working life conditions and increased qualifications
- equal access to education and opportunities to develop personal ambitions, interests and talents
- shared responsibility for home and children¹²

However, strategies are necessary in order to realise visions. In Sweden the governments' gender equality policy states that gender mainstreaming is the official strategy that will be used in order to attain a society where gender equality is reached. The policies on the national level can be summed up as follows:

- Gender equality is a comprehensive issue that is to be a concern for all departments.
- The gender equality perspective is to permeate all aspects of the government's policies.
- All ministers are responsible for gender equality within their respective areas.
- Gender equality is to permeate all levels in society.
- All governmental agencies are to give an account of their gender equality work.
- All government agencies are to have a policy plan for gender equality¹³.

1.2 Institutional architecture

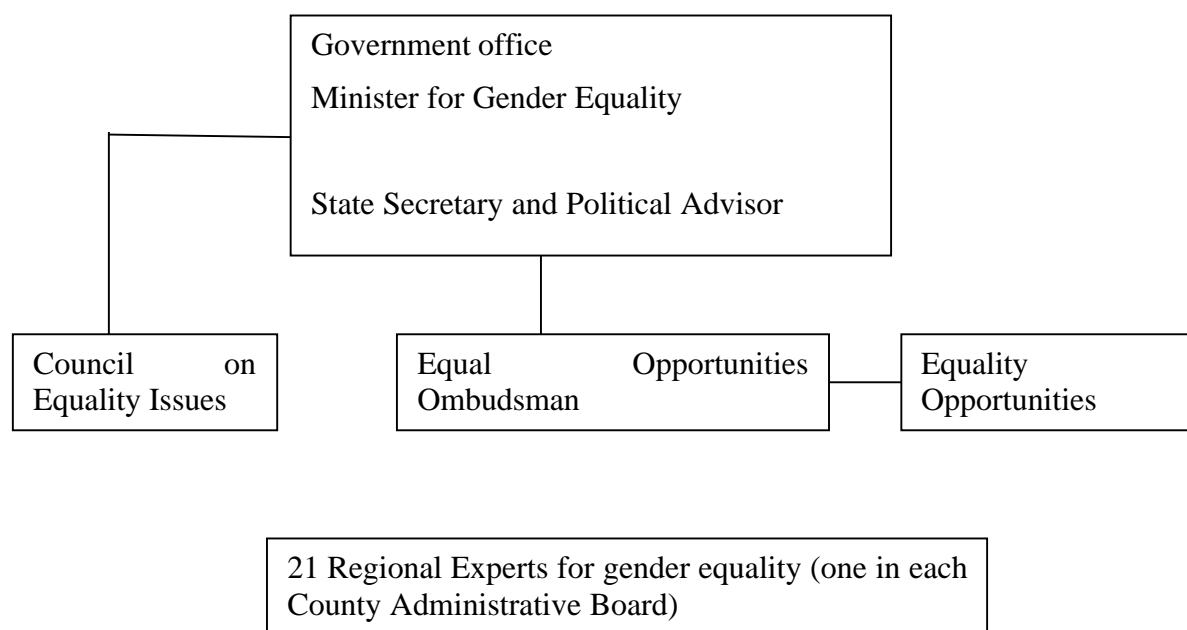
On the national level the gender equality policies are handled by the political staff connected to the Cabinet Minister who is responsible for gender equality issues. The government office located in the Ministry of Industry also has a special unit for handling gender equality matters

¹² <http://naring.regeringen.se/fragor/jamstallldhet/index.htm> [2003, feb. 5]

¹³ <http://naring.regeringen.se/fragor/jamstallldhet/metodutveckling/index.htm> [2003, feb. 5]

- the Division for Gender Equality. This unit, the government authority JämO, and the 21 experts on gender equality in every county administrative board, is the framework for the organisation of gender equality policies in Sweden. The organisation is illustrated in the following chart:¹⁴

Figure 1. Organisation chart for gender equality policies in Sweden.



1.2.1. Division for Gender Equality

The different units and their assignments can be described as follows: at the top we find the Division for Gender Equality whose task it is to support and carry out the gender equality policies at national and regional levels. The division is also responsible for developing methods to implement the governments' gender equality policies. In other words, the division ensures the implementation of the governments' policies, produces decision-making data for bills to the Parliament, and takes part in the work of designing these.

1.2.2. Council on Equality Issues

The Council on Equality Issues is a forum for exchanging ideas and discussion. The Chairperson is the Minister of Gender Equality. The council consists of approximately 40 representatives from different NGOs.

¹⁴ http://naring.regeringen.se/pressinfo/faktablad/PDF/n99_06e.pdf [2003, feb. 5]

1.2.3. The Ombudsman

In the middle we find JämO, whose chief task is to make sure the Equal Opportunities Act (SFS 1991:433) is followed. This is done through guidance, information and through negotiations with private employers and employees or their organisations. The authority can act if a report has been made, or can take initiatives of its own to raise issues regarding the regulation of legislation about active measures for gender equality. Organisations and companies with more than ten employees are obliged to draw up gender equality plans and JämO can call upon the organisations to submit these plans, in order to review them. JämO has also prepared manuals explaining how to plan for gender equality, which any organisation can order free of charge. Furthermore, the authority assists in disputes regarding transgression of the prohibition against discrimination and can also refer to other laws, for example the Security of Employment Act or the Parental Leave Act.

1.2.4. Equal Opportunities Commission

Finally, the Equal Opportunities Commission is an authority whose task it is, after an application from JämO, to order an employer to follow the demands from the legislation for active measures to promote gender equality.

1.2.5. Regional experts

Other units or functions responsible for the realisation of the governments' objectives are the experts on the regional level. From January 1st 1995 there are experts on gender equality in the 21 counties in Sweden. The intention is that the expert should be a support for the county management when it comes to promoting, operating and implementing the national, regional and local objectives for gender equality. The expert should also make sure that the gender equality perspective is taken into account in different areas. Today there are no homogenous organisations in the county councils and the municipalities responsible for the gender equality issues, but both the municipalities' and the county councils' gender equality work has recently broadened to comprise not only personnel policy but also the content of the activity.

1.3. Methods and procedures for mainstreaming gender into public policies

1.3.1. Statistics

At the national level there are a number of methods and procedures for gender mainstreaming. All the official statistics should be disaggregated by sex. The reason is that while working with gender mainstreaming it is vital to have access to fundamental facts and in Sweden there is legislation that states that all official, individual-based statistics should be disaggregated by sex unless there are particular reasons for not doing so (SFS 1992:1668). Thus the statistics should show women's and men's situation, be collected, analysed and presented by sex and also mirror gender equality issues in society (Ds 2001:64).

1.3.2. Gender impact assessment

All official investigations are obliged to analyse their proposals from a gender equality perspective (SFS 1998:1474). The purpose is to make visible underlying assumptions in order to estimate what effect reforms or other changes will have for women's and men's life conditions. Basic analyses are regarded as vital in order to be able to make these estimations.

1.3.3. Gender budgeting

The gender equality perspective should influence the governmental ruling of the public authorities. Through budget documents the government states what the public authorities

should give priority to in the following year, and the authorities, in their turn, account for their activity in the annual reports. One of the most important tools for the government is the Budget Bill. It contains suggestions for guidelines regarding the economic policies and a plan for the state incomes and expenses during the following year. A gender equality perspective is (or should be) integrated into the budget process with the aim of showing how a connection can be made between objectives, budget and results and also of developing a way of following up and evaluating the gender equality policies.

1.3.4. Training of politicians

Ministers, political experts and employees are educated in gender equality by the Division for Gender Equality, something that is seen as vital if the demand for integrating gender perspectives into ordinary work is to be successful (Skr. 1999/2000:24).

1.3.5. Models for gender mainstreaming

Other methods are used in the actual work with gender mainstreaming in organisations in Sweden. There are a number of methods and models designed to support and facilitate this work. One is the **Three-stage model**, which is a proposal for how a process of change can be implemented. The stages are inception, development and application¹⁵. Inception contains executive decision, initial management study and policy formulating. Stage two is a development programme, the purpose of which is to translate the policy intentions into action and also to review and analyse them. Finally stage three serves to formulate goals, follow up the work and then integrate gender equality issues into the regular operation.

Another method is called the **3R-method**; it was developed by Gertrud Åström and the Swedish Association of Local Authorities. The method has primarily been used by local authorities in order to review and analyse the degree of influence women as well as men have on local government operations. It also serves as an aid in systematically compiling facts and information about the situations of women and men in a given operation. The first R stands for Representation and has to do with how many women and men there are in the organisation, or in other words, how many of each sex. The second R stands for Resources and deals with how the organisation's resources are distributed between women and men. The third R, finally, stands for Realia and has to do with why representation and resource distribution are divided between the sexes the way they are. Later Ilija Batljan and Gertrud Åström (Ds 1999:33) have claimed that the 3R method is a good starting point for gender analyses, but its weakness is that it neglects restrictions. Therefore a fourth dimension (or R) has been added¹⁶. This R stands for Restrictions, by which is meant different kinds of limitations regardless of whether they have to do with access to data or the division of resources.

Finally we will mention here a method that has not yet become reality. The investigation of the division of economic power (SOU 1998:6) stated that Sweden, one of the most gender equal countries in the world (according to the UN 1995), is at the same time one of the most sex segregated. In order to do something about this the Swedish government evaluated the possibility for a voluntary **labelling of companies** and organisations from a gender equality view (SOU 2002:30). The investigation proposes the introduction of a system of voluntary gender equality labelling of goods and services, similar to the one of labelling goods and services on an environmental basis.

¹⁵ A description of the model can be found in Just Progress! Applying gender mainstreaming in Sweden.

¹⁶ http://www.lf.se/ag/arbetsomraden/jamstallthet/mainstreaming/verktyg_metoder.htm#4R-metoden [2003, feb. 10]

1.4 Key Non-Governmental stakeholders/actors

There are numerous NGOs in Sweden. To start with, there are the seven largest political parties, which all have a women's organisation, the different national trade unions and a great number of non-profit organisations. All these have opportunities to react to and influence political issues regarding gender equality and gender mainstreaming; many of them are involved as official referral authorities. Those who have one representative in the Council of Equality Issues (see figure 1) are all the seven political parties plus their women's associations, the Swedish Trade Union Confederation (LO), the Swedish Confederation of Professional Employees (TCO) and the Swedish Confederation of Professional Associations (SACO). There are also participants from the Confederation of Swedish Enterprise (which represents company owners) and the Swedish Agency for Government Employers.

1.4.1. Women's organisations

17 other different national associations have a representative each in the Council of Equality Issues. Among others there are the Women's International Zionist Organisation, professional Women's National Federation (BPW Sweden), Women's International League for Peace and Freedom (WILFP) and the Fredrika Bremer Association¹⁷ (FBF). The latter may be noted, since the association was established in 1884. It has from the very beginning worked for women's political rights and is politically and religiously independent. Today FBF is an official referral authority that works for the realisation of gender equality with a starting point in equal rights for women and men, rights and obligations at home, in their professional life and in society. Some questions of special importance for FBF are that power and influence should be equally divided between women and men, that the relation between fathers and their children should be strengthened and that the opportunities for women to be self-employed should be improved.

1.4.2. Female networks

During the 1980s another kind of women's movement emerged. It was mainly women in the sparsely populated areas that began to organise in so called female networks and their aim was to create opportunities that would make it possible to live and work in these areas. Since then networks have remained a fruitful way of organising among women. In the 1990s the Swedish women's movement was represented by Stödstrumporna ('the Support Stockings'), a network started because of the decreasing representation of women in the Swedish Parliament. Although they were fiercely questioned, they succeeded in starting a debate that affected the outcome of the Swedish election in 1994 so that a 'world record' of female representation in the government was attained (Rönblom 2002). Today 45% of the cabinet ministers and 44.4% of all members of the Swedish Parliament are women.

1.4.3. Swedish Women's Lobby

Another way for an NGO to influence is through umbrella organisations. In Sweden many NGOs are gathered in an umbrella organisation called the Swedish Women's Lobby, which also has a representative in the Council of Equality Issues (see Figure 1). This organisation unites about 40 different women's organisations, associations and other organisations with different backgrounds in one national network. Swedish Women's Lobby (previous SAMS – Swedish Women's Organisations Cooperation) was established in 1997 after the UN women's conference in Beijing 1995, and has today 1.4 million members. The intention is to gather the Swedish women's movement and thereby strengthen women's ability for action, and increase

¹⁷ Fredrika Bremer, (1801-1865) a Swedish pioneer for women's liberation; her contribution was of significance foremost in the areas of education and working life (Våra Lärmodrar och Läröfäder, 2000).

women's participation in the decision-making processes in society. Another objective is to work within the European Union through active participation in the European Women's Lobby (EWL), where Swedish women organisations are represented by the Swedish Women's Lobby.

1.5 Barriers to and facilitators of gender mainstreaming

The situation in Sweden today is that the factors (political will, a specific gender equality policy, statistics, knowledge and financing) that are seen as fundamental if gender mainstreaming is to be successful do exist (EG-S-MS (98) 2 rev.). Sweden has, almost from the 1960s, the political will, a special policy for gender equality, and even a Cabinet Minister responsible for the area. Furthermore, all official individual based statistics are disaggregated by sex and there is a huge body of knowledge, mainly at universities and thanks to gender researchers. At the national level it is not financial problems that hinder gender equality.

So, what does hinder then? Several reasons for this can be hypothesised. One is that the Swedish way of taking care of or arranging everything at the national level might constitute a risk. It looks and sounds good but the power of initiative may be weakened and the barriers become invisible (Rönblom 2002). Another reason might be the fact that the Equal Opportunities Act (SFS 1991:433) only regulates working life.

Further, there might be a risk in merging the issue of gender equality with issues of ethnic minorities and other diversity matters, as has been done at Umeå University. Today it is not clear what will happen to gender equality issues if they are merged together with other diversity or equality issues.

Finally Norén (2002) shows an example of barriers that hinder gender equality in her study regarding how female and male politicians are represented in a Swedish news programme. Female politicians are in minority, younger and speak for about five seconds less than men. They are treated differently, described as a subordinate in relation to the man and are more often filmed close up. The reporter treated the female politician differently, even rebuked them, something that never happened with a man. This is one example of subtle but insidious barriers that women have to struggle against in almost every area of life.

2. GENDER EQUALITY AND GENDER MAINSTREAMING IN SOCIAL PROTECTION AND TAX POLICIES

Sweden has a long and genuine tradition of fundamental democratic freedom and rights, democratic foundations that are also the prerequisite for gender mainstreaming. The long tradition of social democratic policies and the building of a welfare state are the causes of the well-developed social insurance system that exists in Sweden. The state is active, everyone has access to welfare services and Sweden has high levels of benefits. The fundamental principle is equality for all citizens, and this has been an important drive behind women's integration into paid work (Mósesdóttir, 1999), an integration that has led to adoption of the dual breadwinner model.

2.1 Treatment of gender in the policy content

A gender equality perspective permeates all parts of the government's policies, and working life and labour market are central areas for this. From the government it is pointed out that the parties in the labour market must take on the responsibility for ensuring equal pay for women and men, counteracting the gender divided labour market and creating conditions that will make it possible for people to combine work with family life. The long-term work for an equal representation of women and men in decision-making authorities and the intention that

the proportion of women in leading positions should increase are issues the government continues to strive for. Besides the active role of bringing about changes in the public sphere, the government also has the role of stimulating actors in other parts of society, not least in the private sector. During the last few years the government has also put emphasis on men and men's conditions, and on how to inspire men to participate more actively in the gender equality work (Budgetprop. 2002/2003:1 Area 14). However, in the Budgetproposition 2002/2003 there is no mention of how the future work with gender equality in the fields of social protection and tax policies should continue.

2.1.1. Income and tax policy

When it comes to income and tax policy Sweden has had individual taxation for income since 1971 (Fürst 1999), but still married couples pay property tax together. The Equal Opportunities Act (SFS 1991:433) regulates most issues concerning income, except salaries and wages. The government would like to ensure gender equality in income, but can only appeal to employers to ensure gender equality regarding income levels. This means that it is an important task for the trade unions to ensure gender equality regarding income and tax issues. On the other hand every company with more than ten employees is obliged to present a gender equality plan, which can be viewed as a device for influencing these matters.

2.1.2. Social insurances

In Sweden there is a health insurance system, which ensures that even if an employee falls ill, the economic consequences will not be too dramatic. There is also an economic support system for families during the period when they have to provide for children. Through income supplements the differences between families with and without children are reduced. Economic support to families with children is given by means of child allowances, maintenance support, housing allowances and parental insurances. The parental insurance, introduced in 1974, gives both parents the opportunity to combine work or studies with being a parent and today it comprises three kinds of cash benefits; pregnancy, parental and temporary parental benefits. The pregnancy benefit allows expectant mothers who are unable to work because of the physically demanding nature of their work to stay at home for a maximum of 50 days and amounts to 80% of their qualifying income. In connection with the child's birth the father gets ten days ("dad's days") temporary parental benefit in order to welcome and take care of the new-born child as well as its older brother(s) and/or sister(s). The parental benefit allows one of the parents to stay at home with their new child for 480 days (390 days with 80% of income and 90 days for SEK 60/day). The days are equally divided between the parents, 240 days each, but one of them can transfer all except 60 days to the other parent. In other words, 60 days are not transferable but have to be used by the parent himself. We write *him*, because this is what is called the "fathers' month" first introduced in 1995. Today there is an intention to further increase this period. The temporary parental benefit, finally, makes it possible for parents to stay at home with their sick children¹⁸. Sweden has finally built up an extensive child care service for which parents pay a monthly charge at a rate of three, two and one per cent of a household's income for the first, second and third child respectively. In 2002 a maximum fee was established, which means that the cost of having a child at pre-school (children up to six years old) will never exceed SEK 1 140 for the first child, SEK 760 for the second and SEK 380 for the third, and for a school child the fee will never exceed SEK 760 for the first child and SEK 380 for the second and third.

¹⁸ http://social.regeringen.se/pressinfo/pdf/familj/familjepolitik_en.pdf [2003, feb. 11]

2.1.3. Pensions

Already in 1914 Sweden had an obligatory general pension, consisting of age- and invalidity insurance. In 1948 it was replaced by the state pension and in 1960 the ATP (supplementary pension) system was introduced. For the first time Sweden had a system for everybody where pension was regarded as a delayed salary for performed work, not an allowance. The amount of ATP depended upon income during the 15 most successful working years and a person got full ATP if she/he had been working for 30 years. However, because of various changes - pensioners becoming more numerous in relation to persons working, people living longer and therefore receiving a pension during more years, increased costs for pensioners and low economic growth - a new reform was needed. This was settled in 1999 and what is significant is that pensions are based on the total income during the individual lifetime. The size of the pension depends on the amount of money the person has earned during her/his entire working life. The pension is divided into three parts; the income pension, the premium pension and the guarantee pension. The guarantee pension is a protection for those that have not worked, or who have a low income-related pension; it is the minimum pension a person can get. The premium pension is the part of the pension that every individual can place in funds. It is worth mentioning that since a woman's income is generally lower in comparison to a man's, the result is that women generally also get lower pensions. Today it is possible to take out a survivor protection policy, before or in connection with retirement.

2.2 Institutional architecture and policy-making processes

At the national level the responsibility for this issue rests first and foremost with the Minister and the Division for Gender Equality. At the next level is the Ministry of Health and Social Affairs and the Ministry of Finance. There are some public authorities that are necessary to mention and these are The National Tax Board and the National Social Insurance Board (RFV) and also The Premium Pension Authority (PPM). However, every department and every governmental authority is expected to have gender equality on their agenda, to make plans, carry out these plans and evaluate their work with gender equality within their area.

2.3 Methods and procedures for mainstreaming gender in policies

In the area of social protection and tax policies all the methods mentioned earlier (Chapter 1.3) are also used here. But it is perhaps in this area that the three reforms (individual taxation, parental insurance, and the child care system) have had the greatest impact as methods in order to reach gender equality (Fürst 1999, Westerberg 1998). Especially the expansion of childcare is an important method for reaching gender equality, according to the High Level Expert Group on Women in Industrial Research in their report to the European Commission (Women in Industrial Research 2002).

2.4 Key actors involved

The trade unions of course play a central part in gender equality matters. The biggest of them are the Swedish Trade Union Confederation (LO), the Swedish Confederation of Professional Employees (TCO) and the Swedish Confederation of Professional Associations (SACO). The employers also have an organisation, the Confederation of Swedish Enterprise. Through the Council of Equality Issues all the 40 different NGOs mentioned earlier have possibility to influence the gender equality work in all areas in Sweden. This forum gives them the opportunity to act and react upon suggestions and propositions also on issues regarding social protection and tax policies.

2.5 Barriers and facilitators

In Sweden much progress has been made and the society has to a great extent got closer to its goal, a society where gender equality is a reality. Nevertheless, there are still barriers.

The system for how to value work used in Sweden cannot be regarded as fair e.g. to work as a nurse is less valued than working as a male engineer. Women in Sweden still earn less than men in general; today the figure is 82% of the male salary. The average salary is 23 300 SKR for men compared to 19 200 SKR for women¹⁹. In fact, the difference has increased; ten years ago women earned 84% of the male salary. It is also a fact that already ten years ago this issue was discussed (Boëthius 1993). This lead to consequences in other areas as well, for example there is a “ceiling” of what amount one can get from the parental insurance, and that “ceiling” is quickly reached. In other words, the family’s total income will be lower if the parent with the highest salary stays at home and since in most cases it is the father who earns the most, the mother stays at home. There are cases when companies, in order to avoid this, have paid/pays the difference between the parental and/or health insurance and the salary so their employees not suffer economically during these periods (SOU 2001:44). To summarise, women have lower salaries, work more often part time during long periods, partly to have the energy to work and partly because they are on maternity leave. This, together with the fact that women live longer and therefore get a smaller amount of the pension gives them in general lower pensions than men.

Sweden has formal rules for gender mainstreaming but progress is rather slow, and this shows that barriers are to be found elsewhere. What is regarded as constituting a barrier differs among researchers. Rönnblom (2002) points to the difference in home work where women still have more of the responsibility which has the effect that they simply do not have the same amount of time available for other things. She also mentions norms and traditions as examples that make it harder for women to make a career. Mörtberg (1997) shows in her research that men in the IT sector take on more responsibility for the family, but still there are things that women are responsible for, which are never taken into account in time surveys, e.g. planning what clothes the children need when winter comes, which occupies the woman but not the man. This is confirmed by Frankenhaeuser (1993) who has showed that on their way home from work women’s level of stress increases while men’s decreases.

There are also signs that point to a positive development in the future, for example that young men are positively inclined to stay at home with their children for half the period (that is; 240 of the 480 days earlier mentioned) according to a Sifo²⁰-evaluation presented by Nordh (2003) (chairman of TCO²¹). The reason these men gave for staying at home with their children was not in order to reach gender equality but because they saw it as favourable for their children.

3. GENDER EQUALITY AND GENDER MAINSTREAMING IN EDUCATION POLICIES

In Sweden the educational system is the responsibility of two bodies. For primary, secondary and adult education the responsibility lies with the municipalities. The government states the objectives, through legislation and regulation, but the actual objectives and the details are decided on by the municipalities. As for higher (or third level) education, the responsibility lies with the government.

¹⁹ Figures from Statistiska centralbyrån (Statistics Sweden) at <http://www.scb.se/> [2003, mar. 9]

²⁰ Sifo research & consulting, an organisation that conduct opinion and society research.

²¹ Swedish Confederation of Professional Employees.

3.1 Treatment of gender in the policy content

In Sweden there is legislation in this area; the Act regarding equal treatment of students in higher education (SFS 2001:1286) requires every university to work actively in order to promote students' equal rights irrespective of, among other things, sex. Further, in its bill (Budgetprop. 2002/2003:1 Area 16) the government states that gender equality is important at all levels of education. The fact that gender equality is still not fully reached, either in the educational system or in society, makes it even more important that a gender perspective should be the starting point for programmes as well as for educational matters. Gender- and class-divided education is regarded as a huge waste of human resources that limits each and every individual's development, since it is still a fact that women and men choose different educational programmes (Högskoleverkets rapportserie 2000:8 R). Generally the number of men is higher in technological and natural science programmes, while women dominate in health care programmes.

Work in primary schools and adult education is regarded as decisive in order to increase gender equality in Swedish society. Every educational organiser at every educational establishment at every level should actively strive for breaking the gender-divided educational pattern. They are expected to carry out this work on their own initiative. Not least important is to make men choose women-dominated educational programmes like teaching and health care as well as to increase interest in studies among men with low education (Budgetprop. 2002/2003:1 Area 16). When it comes to higher education the universities have an assignment that obliges them to take measures in order to bring about a balance between women and men in educational programmes where one sex dominates. They should also work for increasing the number of female university teachers and researchers. The goal is that 25% of all the professors in Sweden should be women by 2008. A step in this direction was taken when the Swedish government decided to establish 31 chairs for the underrepresented gender, the so-called Tham chairs²² (Prop 1996/1997:5). Today this initiative is appreciated and the women who won the professorships can see the advantage of the initiative. They are all confident that their qualifications are the main reason for their appointments even though they got the title because they were women. There have been discussions regarding these professorships but Jordansson (1999) has shown that the discussions were inadequate because all the women were qualified for the work. However, new strategies must be created since a verdict from EU (for Sweden as well as Norway) states that reserving certain posts is not legitimate. Finally it should be emphasised that the government still considers it of vital importance to reach the objective of more female professors and also to increase the proportion of women in leading positions.

There are of course other kinds of state organisations that influence the work with gender mainstreaming at the national level. During the 1970s and later, centres for Women's Studies and Gender Research were built up at several universities in Sweden. Over the years an informal network has worked with these issues on a national level, with the aim of influencing government policies. This work resulted in a secretariat whose aim is to work for the enhancement of women's studies and gender research and information and co-ordination. The Swedish Secretariat for Gender Research was inaugurated in 1998. Two years earlier the Swedish Parliament decided that a comprehensive investment should be made in research from a gender perspective. Some of the Secretariat's primary tasks are to gain a general overview of gender research in Sweden, actively distribute research results both within and beyond the universities, work to increase awareness of the significance of the gender

²² Named after the then minister of education, Carl Tham.

perspective and finally to analyse the status and development opportunities of the gender perspective in all areas of study.

The Nordic Institute for Women's Studies and Gender Research (NIKK) was established in 1995 and is an interdisciplinary Nordic research institute, a body for co-operation regarding women's and men's studies, gender research and activities in the Nordic countries. The institute is part of the Nordic Council and Council of Ministers, which are two organisations for official Nordic co-operation. NIKK is meant to strengthen Nordic co-operation by being a platform in wider international co-operation; and its aim is to advance, initiate, co-ordinate and inform about women's studies and gender research both within the Nordic countries (Denmark, Finland, Iceland, Norway and Sweden, the Faeroes, Greenland) and outside in the adjacent areas of Estonia, Latvia, Lithuania, and north west Russia, as well as Europe and other parts of the world.

3.2 Institutional architecture and policy-making processes

At the national level the responsibility for this issue also rests with the Minister and the Division for Gender Equality. Under them lies the Ministry of Education and Science. There are two public authorities involved, the National Agency for Education and the National Agency for Higher Education, and their task is to ensure that the national objectives are achieved. The National Agency for Education will, from March 1st 2003, be divided into two parts; the National Agency for Education and The Authority for School Development. The first of these will be responsible for supervision of national follow-up measures and evaluation. The latter will support the development work in primary, secondary and adult education. The Swedish state governs these authorities by two means: authority instructions, which can be legislation, regulations or the objectives in the Budget Bill. The Bill declares what the government wants the authority to accomplish during a year.

This area works in the same way as the others, every public authority is expected to have gender equality on their agenda, and since universities are public authorities all of them should make gender equality plans, carry out these plans and evaluate their work with gender equality within their area. These gender equality plans should have two perspectives, one for the personnel and one for the students.

3.3 Methods and procedures for mainstreaming gender in policies

Gender equality plans at the Universities show some examples of different methods used for mainstreaming gender in other policies (Högskoleverkets rapportserie 2000:9 R), such as:

- consider both women's and men's perspective while choosing literature for courses,
- education and/or seminars/days based on the gender equality theme,
- continuous review of the difference in wages,
- both a woman and a man should be suggested as members in different boards/committees,
- written examinations are numbered instead of named (in order to avoid unconscious effect depending on the students gender),
- re-organisation, with committees that should carry on the gender equality work
- mapping of attitudes.

3.3.1. Recruitment of women to higher education

Further, the Swedish government took in 1992 an initiative to recruit more women to higher education in mathematics, science and technology. Five universities, namely Göteborg University, Karlstad University, Stockholm University, Linköping University and Chalmers University of Technology, received about SEK 3 million each for this work. The result shows that three out of seven programmes were quite successful in recruiting and retaining female students to male-dominated study programmes. The initiative can be regarded as a first step in a process that will hopefully survive and continue in years to come. The result shows that three out of seven programmes succeeded in recruiting and retaining women and their common characteristics were included:

- many women were involved (students, lecturers and tutors),
- age, social background and experience varied a lot among students,
- the programmes were small, giving the opportunity for close relations,
- co-operative and problem oriented approach to learning,
- the teachers were deeply involved in the work of development (Wistedt 2001).

Another programme started at Luleå University of Technology 1995, with the all-women preparatory programme in computer science and engineering, abbreviated DTI. This programme was something unique, single-sex programmes in higher education are an untraditional action in Sweden. Only two other universities (Kristianstad and Blekinge) have also offered such programmes. The reasons for starting the programme were the decreasing proportion of female applicants to this kind of programme and the expected needs of skilled labour in these areas. It was regarded as necessary to broaden the recruitment in order to meet these needs (Wistedt 2000). The programme is still running.

3.3.2. Information society for all

The Swedish government consider Information Technology (IT) an important force in the creation of an information society for all (Proposition 1999/2000:86). This includes among other things that people need competence and equal access to IT. One way to secure this is the possibility for many employees to buy computers through their employers, in order to make it economically possible. The computers are paid for through a monthly reduction of wages. There is also much effort put into creating an IT-infrastructure with high transference capacity, or broad band. However, in a democratic information society equal access must be a basic principle. We know that men dominate the development of IT so it might reasonable to assume that the interests and experiences of men have formed the dominating discourse of information technology. Limitations of equal access are also made visible by a multiplicity of variables, such as gender, race, class, age, region, etc (Mörtberg 2000b).

3.3.3. Life long learning

Sweden has, besides the information society for all, a policy regarding life long learning in order to prepare citizens for a working life in learning organisations. The common thought is that the basis for learning will be offered in first level education, and will then be improved continuously throughout every individual's lifetime. A consequence of this is the adult education. In Prop 2000/01:72, the government states that all adults should have opportunity to broaden their knowledge and develop their competence in order to promote personal development, democracy, gender equality, economic growth etc.

3.4 Key actors involved

A key actor for first and second level education is The Swedish Association of Local Authorities. As for third level education there is The Swedish National Union of Students, which aims to protect Swedish students' interests in social welfare and educational issues. The union also represents Swedish students on a national and international level and among its purposes is to speak for the Swedish students, be a source of knowledge in educational matters, and to be a meeting place for students. Gender equality is an issue among others, the student union strives for. This is done through taking part in university board meetings, information and information campaigns, support to students that been treated wrongly or differently because of gender, and so on.

The Nordic Institute for Women's Studies and Gender Research (NIKK) and the Swedish Secretariat for Gender Research of course play a significant role. Again the Council for Gender Equality Issues is involved since it is not limited to certain questions, as are all the NGOs mentioned earlier as key actors.

3.5 Barriers and facilitators

Today in Sweden and in many other countries there are no formal obstacles preventing women from entering fields that have traditionally been dominated by men. One of the strategies of gender equality policies has been to remove formal obstacles and give women and men the same rights to use resources in society, including education and professions in the information technology sector. This is a question of equal rights. The public discussions and gender equality programmes in Sweden has instead been dominated by other arguments such as the quality argument, where it is presumed that women are carriers of certain qualifications that enrich and improve the scientific development (Trojer & Gulbrandsen 1996) or the resource argument (Magnusson 1999, 2000). The resource argument is built upon the presumption that women contribute something that had earlier been absent in politics. Many projects are built on this, but since they hardly ever articulate what that 'something' is, it is hard or even impossible to follow up or measure (Mörtberg 1997).

3.5.1. The Meritocratic system is not followed

This means that here, as in all other areas, barriers are of the more subtle and informal kind. It is small-scale things, such as who is being initiated to projects, discussions and so on that makes it hard for women to get a foothold or be included/listened to. Informal things count and men choose first and foremost other men. That is, the meritocratic ideals and system are not followed and women are neglected, because there are other factors than qualifications taken into account when a post is to be appointed. For example certain posts are tailor-made for favourites and job advertising is done in obscure newspapers during holidays (Wold & Wennerås 2000)

3.5.2. Contradictory situations

Evaluation of the programme DTI in Luleå show another kind of barrier. Even though the university succeeded in recruiting more women it did not take on its responsibility, since women participating in these programmes meet a contradictory situation. On one hand the university takes initiatives to increase the proportion of women in this kind of programme but on the other they have to confront commentaries such as not being competent enough, that they sneaked in through the back door or that they attend the bimbo-programme (Mörtberg 2000a). Hence, results are not as high as expectations.

3.5.3. Lack of methods

According to Jämit (SOU 2001:44) the lack of methods, good examples as well as education and instructions are barriers for integrating gender equality as well as creating the knowledge based society. They suggest that a new public authority will be established, whose task would be to act as a national prompter regarding knowledge and resources for society and industry. The aim would be to become a centre of resources, or in other words an institutional support to the other public authorities, that develops and takes on a responsibility for the further work with mainstreaming gender. Jämit also points to the need for showing cultural, technical, economic, social and juridical structures, visible and invisible, that in one way or another contribute to the unequal society.

3.5.4. Not a priority issue for the universities

Egeland (2002) shows that gender equality is not regarded as a priority issue, for example for the universities. Her conclusion is that one has to examine the production of knowledge and the foundation of science, because "gender equality will not necessarily make obvious, or break, the gender barriers within the Academy. I rather believe that such a project should be shaped as feminist interventions in, and new negotiations around, the understanding of science, of the relationship between science and society, between quality and objectivity"²³ (Egeland 2001, p. 64, our translation.)

3.5.5. Time

Finally, Wistedt (2001) regards time as a barrier. In her evaluation of the five gender-inclusive projects she concludes that "From this follow-up study we have learnt that it takes time to design gender-inclusive programmes: time to create them, time to implement them, time to revise and refine them and, not least, to anchor them in their institutional settings" (Wistedt 2001, p. 124).

²³ "... att tydliggörandet och nedbrytningen av könsbarriärer inom Akademin inte nödvändigtvis uppnås med jämställdhet. Snarare tror jag att ett sådant projekt bör utföras som feministiska interventioner i och nya förhandlingar kring förståelser av vetenskap, av förhållandet mellan vetenskap och samhälle, mellan kvalitet och objektivitet." (Egeland 2001, p. 64).

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SOU 1998:6 *Ty makten är din... myten om det rationella arbetslivet och det jämställda Sverige*, ('For the Power is Thine... the Myth of the Rational Working Life and the Equal Sweden') (available at http://naring.regeringen.se/propositioner_mm/sou/A/sou98_6.pdf). [2003, feb. 14]

SOU 2001:44, *Jämställdhet – transporter och IT. Betänkande från Jämit*, ('Equality – Transports and IT'. Report from Jämit') (available at http://www.naring.regeringen.se/propositioner_mm/sou/pdf/sou2001_44.pdf)

SOU 2002:30 *Märk – värdig jämställdhet. Slutbetänkande från FRIJA-utredningen*, ('Notable and Worthy. Final Report from the FRIJA Committee') (available at http://naring.regeringen.se/propositioner_mm/sou/pdf/sou2002_30a.pdf). [2003, feb. 14]

List of Centres of Competence and Expertise

Ministry of Industry / Division for gender equality
<http://naring.regeringen.se/inenglish/index.htm>

Nordic Institute for Women's studies and gender research, NIKK
<http://www.nikk.uio.no/>

Swedish Secretariat for Gender Research
<http://www.genus.gu.se/>

Swedish Women's Lobby
<http://www.sverigeskvinnolobby.a.se/>

Fredrika Bremer Förbundet
<http://www.fredrikabremer.se/>

Centre for Gender Research, Uppsala University
<http://www.gender.uu.se/>

Centre for Gender Studies, Lunds University
[www.genus.lu.s](http://www.genus.lu.se)

Centre for Women's studies, Linköping University
www.liu.se/org/kvinnoforum

Centre for Women's Studies, Stockholms University
www.kvinfo.su.se

Centre for Women's Studies, Umeå University
www.umu.se/umu/kvf/

Department of gender studies, Göteborg University
www.wmst.gu.se

Department of Gender Studies, Linköping University
www.tema.liu.se/tema-g

Division of Gender and Technology, Luleå University of Technology
www.luth.se/depts/arb/genus_tekn

Division of Gender, Man and Machine, Luleå University of Technology
http://www.luth.se/depts/arb/genus_maskin/index.htm

Jämställdhetscentrum, Karlstads universitet
<http://www.sam.kau.se/genusvetenskap/index.html>

Kvinnovetenskapligt Forum, Örebro Universitet
www.www.oru.se/forsk/kvinnov/
Stiftelsen Kvinnoforum [Women's Forum]
<http://www.kvinnoforum.se/>

Techno science studies, Blekinge Tekniska Högskola
<http://www.iar.hk-r.se/forskning/itg/>

Women's History Collections at Göteborg University
www.ub.gu.se/samlingar/kvinn/

**EQUAPOL: Gender Sensitive and Women Friendly Public Policies: A
Comparative Analysis of Their Progress and Impact**

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**UNITED KINGDOM: STATE OF THE REPORT
Deliverable Number 1**

Prof. Mary Daly

and

Sara Clavero

School of Sociology and Social Policy

Queen's University, Belfast

Northern Ireland

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1. NATIONAL POLICY FRAMEWORK ON GENDER EQUALITY AND GENDER MAINSTREAMING

1.1 General Background

The tradition of gender equality policy in the United Kingdom (UK) has been characterised as having a distinctive focus on women as a disadvantaged social group. According to Rubery and Rake (2000) this tradition has tended to produce policies that deal with the position of women within specific societal structures (e.g., labour market), rather than addressing the question of how those structures have come to be shaped by a history of gender discrimination. This context, the authors argue, is not ideal for the introduction of gender mainstreaming.

GENDER EQUALITY POLICY IN GREAT BRITAIN CAN BE DATED BACK TO THE 1970S. THIS WAS A DECADE WHEN THERE WAS CONSIDERABLE PARLIAMENTARY SUPPORT FOR ACTION AIMED AT ACHIEVING EQUALITY FOR DISADVANTAGED GROUPS (LOVENDUSKI 1995, P. 117). A NUMBER OF KEY PIECES OF LEGISLATION WERE ENACTED DURING THIS DECADE. THEY INCLUDE: (A) THE EQUAL PAY ACT 1970; (B) THE SEX DISCRIMINATION ACT 1975, WHICH ESTABLISHED THE EQUAL OPPORTUNITIES COMMISSION WITH THE REMIT OF IMPLEMENTING AND ENFORCING THE NEW LEGISLATION; AND (C) THE EMPLOYMENT PROTECTION ACT 1975, WHICH GAVE WOMEN A STATUTORY RIGHT TO PAID MATERNITY LEAVE AND OTHER RIGHTS LINKED TO MATERNITY. THESE TWO PIECES OF LEGISLATION WERE PASSED WITH VERY LITTLE OPPOSITION. ACCORDING TO LOVENDUSKI (1995, P. 118) THIS IS ATTRIBUTABLE TO SEVERAL FACTORS, INCLUDING THE GENERAL CLIMATE OF SOCIAL REFORM IN THE 1970S, THE ROLE OF PRESSURE GROUPS AND INDIVIDUAL WOMEN MPS, THE PRESSURE TO COMPLY WITH EEC DIRECTIVES AND THE INFLUENCE OF US LEGISLATION. OTHER RELEVANT LEGISLATION ENACTED DURING THIS PERIOD INCLUDE THE ABORTION ACT 1967, WHICH AUTHORISED ABORTION UP TO TWENTY-EIGHT WEEKS OF PREGNANCY, AND THE DOMESTIC VIOLENCE AND MATRIMONIAL PROCEEDINGS ACT 1976, WHICH STRENGTHENED PROCEDURES BY WHICH WOMEN COULD OBTAIN INJUNCTIONS TO RESTRAIN VIOLENT MALES WITH WHOM THEY LIVE.

In recent years, there have been a number of important gender mainstreaming initiatives in the UK, not only at central government level but also, and especially, in the devolved administrations of Scotland, Wales and Northern Ireland.

At central level, the election of the first New Labour government in 1997 marked a significant watershed in gender equality policy. Developments have included the establishment of specific equality institutions within the central administration, the revision of equality impact assessment methods and the strengthening of the link between government and women's organisations. A distinctive feature of recent equality policy in the UK is a general move towards an integrated policy that combines issues of gender inequality with other forms of inequality. In addition, the government is currently undertaking a major review of equality policy to, among other things, assess the feasibility of creating a single equality commission

in Britain²⁴ that will integrate the three existing agencies dealing with equality issues. With respect to policy procedures, it is important to note that the main equality impact assessment tool in the UK²⁵ - PAET, see 1.3 below - is not gender-specific but covers other forms of inequalities as well.

Since devolution took effect in 1999, the devolved administrations of Scotland, Wales and Northern Ireland have promoted gender mainstreaming to a much larger extent than the central government. According to Beveridge et al. (2000, pp. 402-403), the more effective integration of gender mainstreaming into the policy-making processes in the devolved regions has been facilitated by the fact that devolution has required the establishment of new institutions and procedures. The devolution process in the UK in relation to equality policy has been analysed by a number of experts, some of whom have raised critical questions about the division of responsibilities between the central and devolved administrations. In a recent report, the Women's National Commission drew attention to the lack of clarity, following devolution, over the lines of accountability with respect to gender equality policy, noting that the women's remit needs to be more clearly defined and explained as devolution progresses (Women's National Commission 1999, p. 61). Also, in their analysis of gender mainstreaming in the UK, Beveridge et al. (2000, p. 403) warn of tensions that may develop over equality policies as a result of a mismatch between the processes of central government and those of the devolved governments.

1.2 Institutional Architecture

At central government level there are four key gender equality institutions. These are: the Equal Opportunities Commission; the Women and Equality Unit; the Ministerial Subcommittee on Equality; and the Women's National Commission. In the devolved administrations, a number of new gender and equality institutions have been created in the past three years. These institutions are briefly described in turn.

1.2.1 Equal Opportunities Commission (GB)

The Equal Opportunities Commission (EOC) is the major authority in charge of enforcing and developing equality legislation in Britain. Set up in 1975 with the aim of overseeing the 1975 Sex Discrimination Act, it covers England, Scotland and Wales and works in conjunction with the Equality Commission for Northern Ireland.²⁶

The EOC was established as a quango or quasi non-government organisation so as to give it some degree of independence from government. It functions as a non-departmental public body funded through grant-in-aid. Although it works independently of government, it is directly responsible to the Women and Equality Minister. Its main sponsor nowadays is the Women and Equality Unit (see section 1.2.2 below).

²⁴ Northern Ireland already has a single equality commission dealing with a very broad range of equality issues.

²⁵ In Northern Ireland, the procedure for assessing public policies from an equality perspective is different from that used in the rest of the UK although it is not gender-specific, either.

²⁶ The Equality Commission for Northern Ireland was established by the *Northern Ireland Act* of 1998. It represents the amalgamation of four discrete equality agencies: the Commission for Racial Equality of Northern Ireland, the Equal Opportunities Commission for Northern Ireland, the Fair Employment Commission and the Northern Ireland Disability Council.

Since its inception, the Commission has undergone significant development with respect to its role in providing leadership in the advancement of women. In her study of the EOC, Lovenduski (1995, pp. 124-126) distinguishes three different stages. The first was the 1970s, when the Commission's work proved disappointing to many observers since politically active feminists were more or less excluded from its activities. During the 1980s, the second stage, the EOC is said to have become more feminist and aggressive in its leadership, acting as a support for women seeking help and resources for feminist causes. Thirdly, during the 1990s the Commission set out, for the first time, clear objectives - one of which was the mainstreaming of sex equality policy - against which progress could be measured.

In its Corporate Plan for the years 2001/2002 to 2003/2004, the integration of a gender perspective at all levels of government is included among the Commission's priority themes. This new emphasis on mainstreaming gender equality is a significant development, not least because it presupposes a new understanding of the concept of equality. The EOC explicitly states that it is willing to re-examine its understanding of sex equality, moving the debate from equality as protection from discrimination to equality as a positive right (EOC 2002, p. 4).

The EOC has played an important role as the main focal point for networking on women's policies at national level (Lovenduski 1995, p. 115). However, one of its difficulties is to decide whether it should carry out government policy or respond to a constituency of mobilised women irrespective of government's views. Another difficulty is its low budget. According to the report submitted by the Women's National Coalition to the United Nations on the implementation of the Beijing Platform for Action (Women's National Commission 1999, p.65), the under-funding of the EOC is a major cause of slower progress in the advancement of women.²⁷

1.2.2 Women and Equality Unit

Formerly called the Women's Unit, this was first established soon after New Labour gained office in May 1997, with the aim of coordinating work in promoting women's interests across government departments. As part of a general move towards the integration of equality policy in the UK, the Unit was renamed and relaunched as the Women and Equality Unit after the 2001 election (in which New Labour was returned to power). One significant difference from the former Women's Unit is that the equality remit of the new Unit has been broadened to include a range of criteria - age, sexual orientation and religion - along with gender. The Unit is headed by two Ministers for Women and Equality. However, because this is a departmental cross-cutting unit rather than a proper ministry, its ministers do not sit in the cabinet.

Following devolution in 1999 similar bodies have been set up in the Scottish, Welsh and Northern Ireland Executives. These units have mainly a supportive role, ensuring that other departments mainstream equality issues across all their policies.

Squires and Wickham-Jones (2002) are critical of the original Women's Unit. They suggest that, although the Unit devoted considerable attention to obtaining information about women's interests and the promotion of good research, much of its work focused on information gathering rather than the implementation of specific initiatives. Thus, when measures were implemented during the period 1997-2001, the primary agent was the relevant government department rather than the Unit. In essence, the level of integration of the Unit

²⁷ Although the budget was increased marginally in line with inflation throughout the 1990s, funding for the years 1998/1999 was lower than that granted to other equality agencies.

into the policy-making process during the period was only partial (Squires & Wickham-Jones 2002, pp. 65-69).

The Women and Equality Unit sets its own programme so it is very important that there is a fit between its programmes and those of government. According to the assessment by Squires and Wickham-Jones, a lack of fit between the agenda of Women and Equality Unit and that of the government has acted to limit the Unit's capacity to participate in policy-making (2002, p. 67). The critical factor was a tension between the promotion of a family-friendly policy favoured by government and a woman-friendly policy favoured by the Unit to which the government showed a significant degree of hostility. Although the promotion of family-friendly policies was also one of the objectives of the Unit, Squires and Wickham-Jones point out that the government addressed the issues concerned in un-gendered language which, according to them, marginalised the space for a distinct 'women's agenda' (ibid, p. 67). Thus, the Unit was the subject of criticism from both right and left to the extent that, by the end of the 1997-2001 parliament, the future of the Unit was perceived to be under threat. Yet, the Unit was retained after the 2001 election, maintaining its location within the Cabinet Office. According to these authors, the increase in the responsibilities given to the unit is an indication of an increased commitment to it on the part of the government.

1.2.3 Women's National Commission

The Women's National Commission was set up in 1969 as the official, independent body advising on the views of women to government. It is a non-departmental public body (fully funded by government but able to comment freely on government policy), acting as the principal conduit between non-governmental organisations and government. After the UN Conference in Beijing in 1995, the Women's National Commission obtained consultative status with ECOSOC at the UN. As a result, it makes available UN materials to women's organisations in the UK and organises responses from them. In 1996 a National Agenda for Action was drawn up by the Women's National Commission together with the Equal Opportunities Commissions of Great Britain and Northern Ireland in consultation with and endorsed by organisations representing millions of women throughout the UK. This consisted of ten policy papers, which provided the basis for the UK implementation of the UN Platform for Action. One of these policy papers was on gender mainstreaming.

Under previous governments the Women's National Commission was a small, low profile, advisory agency located within the Department of Employment. On taking office in 1997 the New Labour government set in place a major review of the Commission which, together with the Commission's own review of its organisation, resulted in a series of proposals for modernisation. One of the major changes was the opening up of the Commission to all women's groups in the UK (previously there was a limit of 50 organisations).

1.2.4 Ministerial Sub-Committee on Equality

This is a new cabinet Sub-Committee²⁸ created after the 2001 general election. It replaced the Cabinet Sub-Committee on Women, which was set up after the 1997 general election as part of a general move to integrate equality policy in the UK. Cabinet committees provide a framework for collective consideration of and decisions on major policy issues and those of significant public interest. Hence, the Ministerial Sub-Committee on Equality draws together

²⁸ Cabinet committees provide a framework for collective consideration of and decisions on major policy issues and those of significant public interest. They ensure that issues that are of interest to more than one department are discussed and that the views of all relevant ministers are considered.

ministers from across all major government departments and is chaired by the current Minister for Women and Equality. Its remit is to review and develop government policy on equality and to oversee its implementation. Members act as focal points for equality concerns in their own departments.

1.2.5 Parliamentary Committees in the Devolved Regional Governments

There is no parliamentary committee on women and/or equality issues in the parliament at Westminster. This has been strongly criticised by the Women's National Commission (1999, p. 61). In contrast, the newly-established parliaments in the devolved administrations have set up committees on equality issues and these are playing an important role in the development of an equality agenda in those regions.

The Scottish Parliament has established an Equal Opportunities Committee with the remit to consider and report on matters relating to equal opportunities and the observance of equal opportunities within the parliament. In other words, it complements the role of the Equality Unit in the Scottish Executive, considering the equality implications of all legislative proposals and major policy initiatives before they become law. The Committee has also an important role as a point of contact between non-governmental organisations concerned with equality issues and the parliament. The Welsh Assembly has also established an Equal Opportunities Committee with a similar remit. However, according to Beveridge et al (2000, p. 399), this Committee in the Welsh Assembly has a much lower profile than that in the Scottish Parliament.

1.3 Gender Mainstreaming Methods and Procedures

There are a number of relevant initiatives to report here.

1.3.1. Policy Appraisal for Equal Treatment (PAET)

The main tool used to assess policies from a gender perspective in the UK²⁹ is known as Policy Appraisal for Equal Treatment (PAET). Dating from 1992, these guidelines were subsequently revised and updated in 1996. Shortly after the 1997 general election, the newly-established Women's Unit undertook a revision of these guidelines together with the Home Office (which is in charge of racial issues) and the Department for Enterprise and Employment (in charge of disability issues). The new guidelines, which took effect in 1998, cover equal treatment in regard to race, sex and disability. Their purpose is to ensure that policy makers can identify whether any target group might be disadvantaged by a particular policy and consider whether any differential impact is legally permissible or justifiable in policy terms and propose amendments. They apply to the development and delivery of all government policies, programmes and services.

In their report on gender impact assessment in the UK, Rubery and Rake (2000, pp. 392-394) criticise the new PAET guidelines on a number of fronts. The main perceived shortcoming is that the guidelines focus more on policy proofing than on mainstreaming. In other words, what PAET does is to ensure that policies are not unlawful and, if they have any negative

²⁹ Unlike the rest of the UK where equality proofing of policies is non-statutory, in Northern Ireland there is a statutory duty on public bodies to carry out impact assessments on the potential effects of policies on equality. Each public authority is required to promote equality of opportunity on nine grounds: gender, religious belief, political opinion, racial group, age, marital status, sexual orientation, disability and having dependants. In Scotland, the Executive has made a commitment to mainstream equality. Following this commitment, an equality strategy was launched in 2000. The strategy document outlines a phased approach to equality proofing of all policy-making in the Scottish Executive.

impact on target groups, ensure that these impacts can be defended as consistent with policy objectives. Thus, it is not an impact assessment tool used at the stage of policy formulation and design. Another problem is that, although all departments and agencies are required to monitor and evaluate their proposals and report on progress, individual departments decide internally how the guidelines are to be implemented or monitored. Furthermore, since the guidelines cover race and disability as well as gender, there is no specific indication of the types of gender issues which would need to be taken into account in their application. Thirdly, there is an absence of machinery for monitoring and evaluation.

Beveridge et al. (2000, p. 393) also criticise the PAET guidelines. For them, equality proofing remains a highly centralised, bureaucratic process. They note great inconsistency between departments in their implementation. This criticism was picked up by the Women's National Commission in its report on the implementation of the Beijing Platform for Action where the lack of universal implementation of the guidelines by all government departments was noted. Given this, the report recommended that the government monitor the application of the guidelines and report annually on progress. (Women's National Commission 1999, p. 64).

1.3.2. Gender Impact Assessment Framework

A notable development in gender impact assessment in the UK is the recent design of a framework for assessing the impact of policies on women by the Women and Equality Unit. This Gender Impact Assessment Framework is explicitly targeted at gender issues and adopts a more pro-active approach to gender impact assessment than the PAET. One significant innovation in the new framework³⁰ is that its focus is not on existing policies but on introducing gender impact assessment at the very early stages of the policy-making process.

1.3.3. Women in Decision Making

Other developments in gender mainstreaming mechanisms include the introduction in 2001 of the Sex Discrimination (Election Candidates) Act, which enables political parties, on a voluntary basis, to adopt positive measures to reduce inequality in the numbers of women and men elected as representatives of the party.

1.3.4. Statistics

With respect to the development of gender statistics, it is worth mentioning the establishment of the Gender Statistics User Group. This group was launched by the New Labour government in 1998 with the support of the Office of National Statistics, the Women and Equality Unit and the Equal Opportunities Commission. The aims of this group are, among other things, to improve the production and reporting of gender statistics, to contribute to the understanding of gender differences and inequalities in the UK and to help with the development and evaluation of policies relating to gender differences and inequalities.

1.4 Stakeholders/Actors

Political parties and trade unions rather than women's organisations have been said to be the principal agents in the development of gender equality policy in the UK. As one expert argues (Gelb 1989), due to a strong tradition of party politics and a powerful and well-organised left, feminists have tended to organise as pressure groups within the Labour Party and trade unions rather than lobbying from grass-roots groups. According to Gelb (ibid, p. 105) feminist grass-roots have not played a prominent role because of the nature of British policy-making structures and processes, historically characterised by a highly centralised government and

³⁰ Available at: http://www.womenandequalityunit.gov.uk/gender_mainstreaming/gender_impact_assessment.

parliament and the primacy of secretive administrative processes operating behind closed doors. This has acted to exclude certain sectors of the populations from access to power. Political parties and trade unions have traditionally played a prominent role in the resolution of key political issues in general and, therefore, feminists aiming to influence the political system have gravitated in their direction (ibid, p. 107). Although local feminist groups developed during the 1970s, little attempt was made to establish national co-ordination. However, there is an umbrella organisation for each of the UK regional administrations having direct links with the European Women's Lobby in Brussels. These are: the National Alliance of Women's Organisations (England), the Northern Ireland Women's European Platform (Northern Ireland), the Engender Network of Women's Organisations (Scotland) and the Wales Women European Network (Wales).

1.5 Barriers and Facilitators to Gender Mainstreaming

1.5.1 Barriers

There are two identifiable barriers to gender mainstreaming in the UK. The first relates to a long and well-established tradition of anti-discrimination policy. In the UK gender is generally treated as one form of disadvantage and there is a preference for looking at equal opportunities and mainstreaming as applying to all disadvantaged groups. This tradition may act as an obstacle to the revised understanding of gender equality that the introduction of gender mainstreaming strategies requires and, consequently, to the establishment of the necessary institutions and procedures to implement such strategies.

The second possible barrier to gender mainstreaming is specific to the present government. A number of experts have already drawn attention to tensions arising between the institutional machinery for women and the ideology of the New Labour government. Such tensions are seen as the result of the party's predisposition towards communitarianism which places the focus on relatively conservative notions of family and community. For example, according to Tony Blair (Blair 1998) reconciling changes in the role and opportunities of women with the strengthening of the family and local communities is one of the greatest challenges of contemporary public policy. The extent to which the present UK government subscribes to the concept and principle of gender mainstreaming is not yet clear.

1.5.2 Facilitators

The influence of the EU is crucial in this respect. A number of authors, such as Rees (1999, p.180) have emphasised the important part played by membership of the EU, which the UK joined in 1972. EU accession led to the introduction of sex equality legislation in the 1970s together with later amendments in the 1980s, the introduction of positive action measures such as parental leave legislation and, most recently, the requirement that the gender mainstreaming principle be applied to the entirety of the National Action Plans on Employment, as well as to all projects funded under the Structural Funds. These and other measures led to the creation of a culture of positive action in the UK.

A second facilitator is the devolution process currently taking place in the UK which is having a huge impact on equality policy. It appears that the barriers to gender mainstreaming at central government level do not exist in the devolved administrations. For example, several authors (Beveridge et al 2000) have emphasised the political opportunities given to women's organisations in the devolved administrations. Thus, a feature of the mainstreaming processes in these administrations is the central role accorded to consultation and participation of non-governmental groups in the policy-making process. This development gives greater

prominence to concerns not heard so readily at central government and also raises the issue of women's empowerment.

2. GENDER EQUALITY AND GENDER MAINSTREAMING IN SOCIAL PROTECTION AND TAX POLICIES

Unlike education, social protection and taxation policy are in the UK relatively highly centralised. Hence, it is meaningful to locate the analysis in this section at national level.

The social protection and taxation arrangements in the UK have a number of features which are relevant from a gender perspective. In the first instance, there are two tiers to social protection: social insurance and means-tested benefits. The tendency has been for men to claim the higher paying social insurance benefits whereas women rely more on means-tested benefits. When it comes to taxation, while UK arrangements in the past treated married couples as one unit and therefore promoted a male breadwinner model. However, the Married Couple's Tax Allowance has been abolished in favour of taxation measures which direct support to families with children. These and other features have led to the characterisation of the UK system as a strong breadwinner model in that it has tended to treat men as workers and women as primarily home-makers (Lewis 1992).

Getting people into employment has been one of the main thrusts of social protection and taxation policy in recent years, especially since the New Labour government took office in 1997. Hence the welfare system has seen a host of 'welfare to work' initiatives, including in the social protection system a series of 'New Deals', whereby specific sectors of the benefit claiming population are targeted by measures to encourage and in some cases compel them into employment, and the taxation system has seen a major move to replace welfare payments with tax credits. As a result, the social protection system, being ever more closely integrated with the tax system and tied to employment and employability, is in the process of being transformed.

2.1 Treatment of Gender in the Policy Content

Gender has not been prominent as an issue in social protection and taxation policy and its reform in the UK. With a strong focus on households and families, issues of inequality between women and men have tended to be downplayed, both as a driver of policy reform and as a possible consequence of changes that are being made. The use of gender-neutral language, and indeed a gender neutral approach, is widespread. For example, the first UK National Action Plan on Social Inclusion, submitted to the European Commission in June 2001, identifies some key target groups (along with children) as 'working-age adults', 'older people' and 'deprived communities'. Any gender effects that have come about, therefore, have been as a spin-off from other objectives rather than a sought-after change.

It is worth highlighting a number of recent reforms that are known to have had an effect on gender inequality. For example, women were the primary beneficiaries of the introduction of the national minimum wage (in 1998), with figures showing a positive impact on women's wages (Rake 2002, p. 217). In addition, the new tax credits that have been introduced (*viz* Working Tax Credit, Child Tax Credit) have affected not just the incentives for women to be in the labour market but also the relative income shares of women and men. When tax credits were first introduced (in 1998/9), there was considerable concern among women's organisations that, because they were based on joint income and the level of the thresholds set for tax, they would have the effect of discouraging women from paid employment. An additional concern was that replacing cash benefits with tax credits would result in a loss of

income to women (since fewer women are eligible to pay tax) (Rubery 2001). While the exact effects are not yet known, some of these concerns have been addressed by changes made to the tax credit system during 2002 (HM Treasury 2002).

2.2 Institutional Architecture and Policy-Making Processes

There has been considerable administrative reform in regard to social protection in the UK. In June 2001 a new Department for Work and Pensions was created, formed by merging areas of the abolished Departments of Social Security and Education and Employment. The administrative re-organisation was undertaken so as to implement the government's welfare to work policies. This new Department now governs the UK social protection system. It is assisted in this by two new agencies (or 'businesses' as they are called) which were created in April 2002. The Jobcentre Plus Network provides help in finding employment and paying benefits to people of working age whereas the Pension Service deals with people who are in receipt of pensions. The relevant agency governing taxation policy is the Treasury. This has not changed in recent years.

2.3 Methods and Procedures for Mainstreaming Gender in Policies

There is no evidence of efforts or indeed plans to mainstream gender in social protection and taxation policies in the UK. For example, social protection and taxation are not among the specific issues which the Women and Equality Unit has prioritised and it is not known to what extent the PAET guidelines have been applied to this domain of policy. As pointed out by the literature, this is to all intents and purposes an internal administrative process (Rubery & Rake 2000).

2.4 Key Actors Involved

Although generally interested in the financial well-being of women and financial aspects of gender inequality, neither the EOC nor the Women and Equality Unit have targeted social protection and taxation. Hence they are not key actors in this policy domain. One of the sole 'voices' in regard to gender and income inequality is the Women's Budget Group (www.wbg.org.uk). This is an independent organisation which brings together academics and people from non-governmental organisations and trade unions to form a network of experts to promote gender equality through appropriate economic policy. As well as advocating specific policies, the Group aims to encourage the government to use gender analysis to improve its economic policy making.

2.5 Barriers and Facilitators

There are several reasons why gender has not been prominent in social protection and taxation policy in the UK. In the first instance, there is no strong lobby group active on this particular issue. For example, the Women's Budget Group is relatively new and tends to operate through consultation and informed exchanges with policy makers rather than as a public pressure group. In addition, none of the political parties has prioritised this aspect of social policy from a gender perspective. The very centralised nature of policy making in this domain is another likely barrier. As the analysis in earlier sections of this report has shown, devolution and decentralisation have, among other effects, lent a gender impetus to policy making and review.

3. GENDER EQUALITY AND GENDER MAINSTREAMING IN EDUCATION POLICIES

Unlike income protection and taxation, education policy is highly decentralised. The remit of the central government department dealing with educational issues, the Department of Education and Skills, extends only to the planning and administration of education policy and services in England and (partially) Wales. Education-related legislation enacted by the Westminster parliament applies only to these jurisdictions. The devolved governments of Scotland and Northern Ireland have full powers to legislate in the field of education and each has its own department with responsibility for policy planning and administration in education. In contrast to the other devolved administrations, the Welsh Assembly can enact only secondary legislation. This includes the implementation of education policy, wherein it has responsibility for setting the content of the national curriculum for Wales.

Given time and space limitations, the following overview of gender equality policy in the field of education in the UK will be limited to England and Wales.

3.1 Treatment of Gender in the Policy Content

In England, the two most important recent policy documents on education have been the White Paper on secondary education and the 2002 Green Paper on education for children aged between 14 and 19 years.

Neither of these two documents makes reference to mainstreaming gender equality. Nor is there reference to gender in the vision, objectives, or targets of these papers and gender equality issues in relation to subject choice, educational achievement or gender stereotyping are nowhere raised.

In their submission to the Department of Education and Skills on both the Green and White Papers, the EOC argued that this failure to integrate a gender perspective into educational reform in England may result in the introduction of new forms of gender segregation within the new system (www.eoc.org.uk). Thus, for example, both the White and the Green Papers contain proposals for the introduction of greater vocationalism for all 14-19 year olds, but this can undermine the successes of the national curriculum in balancing the proportion of girls and boys studying science subjects up to GCSE levels unless the issue of gender stereotyping and its impact on the vocational career paths of girls and boys are recognised.

The situation in Wales contrasts sharply to the slow progress made in mainstreaming gender equality in education policy in England. A recent report produced by the Institute of Welsh Affairs (Chaney & Fevre 2002) indicates that devolution has had a significant impact on the promotion of equality in Wales. With respect to education policy, the Welsh Assembly made an explicit commitment in its programme for government to mainstream equality into the first Wales-specific national curriculum, which was introduced in September 2000 (National Assembly for Wales 2000, p. 27). This was confirmed one year later in the Assembly's annual report, which underlined that the national curriculum of Wales was developed with explicit attention to the Assembly's key policy priority of promoting equality of opportunity (National Assembly for Wales 2001, p. 25). In conjunction with the integration of an equality perspective into the national curriculum, the Welsh curriculum authority prepared a guidance designed to help schools promote equal opportunities in its delivery, which was distributed to all schools. Apart from action on primary and secondary education, the national strategy for the higher education sector in Wales, published in 2002, set out specific aims in respect of promoting equality of opportunity, including gender equality.

3.2 Institutional Architecture and Policy-Making Processes

In England, the principal education institutions are the Department of Education and Skills, which has overall responsibility for the planning and monitoring of education policy and services and Local Education Authorities, which are in charge of implementing and administering that policy at regional level. In Wales, the National Assembly Training and Education Department has responsibility for the national curriculum and qualifications and for the administration and organisation of education including pre-school, primary, secondary, higher/further education and training. Apart from this, there is also an education committee at the Welsh Assembly with a remit of reviewing education policy in areas which it has identified as either having no cohesive or national policy or where an existing policy needs to be revisited. As in England, local education authorities implement and administer policies determined at national level.

In both national settings, the EOC plays an influential role in the development of gender mainstreaming practices within education policy. This is especially the case in Wales, where the Commission is assisting the Welsh Assembly to mainstream equality more effectively into both the policy-making process and service delivery. Examples include recent work with the Welsh curriculum authority to integrate equality more effectively into the school curriculum and the publication in 1999 of a research report on gender equality in education in Wales, *Different but Equal*, which provides guidance for schools on how to achieve gender equality.

3.3 Methods and Procedures for Mainstreaming Gender in Policies

In England, there is not much evidence of gender mainstreaming practices in education policy, despite the fact that the Department of Education and Skills has made an explicit commitment to gender mainstreaming, including commitments to make use of the PAET guidelines, to provide gender awareness training for policy makers and to increase the use of consultation, research projects and disaggregated statistics in order to identify the likely impact of policy (Department of Education and Skills 2001).

The main policy instrument for tackling gender equality issues in education used in England is positive action campaigns set up by government departments, equality agencies such as the EOC and by non-governmental organisations. The most recent actions include the following:

- the campaign by the Department of Education and Skills to tackle educational under-achievement of secondary school boys (www.standards.dfes.gov.uk/genderandachievement). This consists of an internet website providing Local Education Authorities, parents and teachers with information and support on gender and achievement, including best practice examples.
- the campaign by the Department of Trade and Industry aimed at increasing the numbers of women in science, engineering and technology in education and employment (www.set4women.gov.uk). The Department runs a unit to tackle women's under-representation in those employment areas. Among other things, this unit supports organisations and networks of women within the science community, develops policies to mainstream gender in science, engineering and technology in the UK and the EU and provides up-to-date statistics on the state of women's participation in the relevant areas.
- the campaign by the EOC to combat gender stereotyping 'What's Stopping You' (www.eoc.org.uk). This consisted of different adverts showing images that break with pre-conceived ideas about the sort of activities that girls and boys are supposed to do. A resource pack for teachers and career advisers was also produced which included

suggestions for activities to help teachers and career advisers tackle gender stereotypes in the classroom.

- the ‘Athena Project’ which aimed at the advancement of women in science engineering and technology in Higher Education. This was core funded by UK Higher Education Funding Councils, Department of Trade and Industry and UK universities (www.athena.ic.ac.uk).

In Wales, there is evidence of a significant degree of integration of gender equality issues into education policy. Yet, it is important to note that education policy in both England and Wales is subject to equality proofing rather than to gender impact assessment.

3.4 Key Actors Involved

The influential work of the EOC in the development of gender mainstreaming has already been noted. Apart from this, there are a number of voluntary organisations lobbying government on the need to mainstream gender in education. These include the Fawcett Society, the National Youth Agency, and Women’s Sports Foundation. The work of the Fawcett Society (www.fawcettsociety.org.uk), one of the leading UK organisations campaigning for gender equality, is especially noteworthy. Currently, it is running a campaign entitled ‘Equality? Get Real!’. One focus of this campaign is educational choice, highlighting issues of gender stereotyping and raising awareness about equality and education. It also aims at empowering young people to become active citizens in campaigning for change.

3.5 Barriers and Facilitators

There are number of potential barriers as well as facilitators to gender mainstreaming in the field of education. These, however, are no different to those already identified in section 1.5 above. Among the negative factors are the tradition of anti-discrimination policy and the relatively traditional attitude taken by the current government to family and community. On the other hand, the influence of the EU and the devolution process which has been undertaken in the UK have acted to facilitate moves towards gender equality.

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List of Centres of Competence

Economic and Social Research Council (<http://www.esrc.ac.uk>)

Institute of Public Policy Research (<http://www.ippr.org.uk>)

Policy Studies Institute (<http://www.psi.org.uk>)

Equal Opportunities Commission (<http://www.eoc.org.uk>)

Fawcett society (<http://www.fawcettsociety.org.uk>)

Women's National Commission (<http://www.thewnc.org.uk>)

Women and Equality Unit (<http://www.womenandequalityunit.gov.uk>)

Institute for Feminist Theory and Research (<http://www.iftr.org.uk>)

Engender – Information, Research and Networking Organisation for Women in Scotland
(<http://www.engender.org.uk>)
