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Assessment of the European Globalisation Adjustment Fund from a gender equality perspective

Study for the FEMM Committee

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DIRECTORATE GENERAL FOR INTERNAL POLICIES

POLICY DEPARTMENT C: CITIZENS' RIGHTS AND CONSTITUTIONAL AFFAIRS

WOMEN'S RIGHTS & GENDER EQUALITY

Assessment of the European Globalisation Adjustment Fund from a gender equality perspective

STUDY

Abstract

The study was requested by the European Parliament's Committee on Women's Rights and Gender Equality and commissioned, overseen and published by the Policy Department for Citizens' Rights and Constitutional Affairs. This assessment aims at investigating gender differences in the number of beneficiaries across EGF interventions. By adopting the gender budgeting principles, the analysis conducted across all Member States and with a focus on seven Member States, shows that at least four are the intervening factors: a more frequent implementation of EGF in male-dominated sectors, which is in turn related to the gender differentiated impact of the crisis by sectors, the size of the firms involved in the interventions, the prevailing productive structure by sectors.

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RESEARCH ADMINISTRATOR RESPONSIBLE

Erika Schulze
Policy Department C: Citizens' Rights and Constitutional Affairs
European Parliament
B-1047 Brussels
E-mail: poldep-citizens@europarl.europa.eu

AUTHOR(S)

Silvia Sansonetti

LINGUISTIC VERSIONS

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LIST OF ABBREVIATIONS

ALMP	Active Labour Market Policies
EGF	European Globalisation and Adjustment Fund
GB	Gender Budgeting
MS	Member State
NEET	Not in education, employment or training
SME	Small and medium enterprises
YEI	Youth Employment Initiative

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EXECUTIVE SUMMARY

Background

The **European Globalisation Adjustment Fund** (EGF) was set up in 2006 in order to demonstrate solidarity with **workers made redundant** as a result of major **structural changes** in **world trade patterns** due to globalisation, and to provide support to a large number of workers[1]. However, the **rules** governing the EGF were **amended**[2] in order to **extend its application to** redundancies caused by the **economic crisis**. More recently its implementation has been further extended to **provide support to self-employed** as well as **additional tools** to Member States for the implementation of the **Youth Employment Initiative** (YEI)[3].

EGF support includes **active labour market policy (ALMP) measures** for up to 24 months from the date of application[4]. Its main characteristic is to provide **one-off**, **time-limited**, **flexible**, and **tailor-made** measures to support **re-employment of redundant workers**.

The **EGF** is **implemented** under **shared management** with a strong **focus on subsidiarity** as regards **ALMP measures** offered and their implementation. It is meant as a **complement** to the **European Social Fund (ESF)**, e.g. by implementing measures that would be too long and too costly or not eligible under the ESF, and stakeholders are thus expected to look for complementarity among national, ESF, and EGF measures[5].

According to the existing **evaluation documentation** produced by the European Commission, the number of **women beneficiaries** across EGF interventions is **smaller than** that of **men** on average. This report investigates whether this result is due to existing labour market conditions or is related to implicit forms of gender-based discrimination related to the structure and implementation of the fund.

Aim

The **overall goal** of the present study is to provide critical evidence on the implementation of the **EGF** from a gender equality perspective, by making use of **gender budgeting** (GB) principles. The study considers the relevant results across all Member States and focuses on **seven** selected **Member States**: Germany, Greece, Finland, Poland, Romania, Ireland, and Spain.

[1] Regulation (EC) No 1927/2006. of the European Parliament and of the Council of 20 December 2006 on establishing the European Globalisation Adjustment Fund. The EGF is based on Article 175 of the Treaty on the Functioning of the European Union (TFEU).

[2] Regulation (EC) No 546/2009 of the European Parliament and of the Council of 18 June 2009 amending Regulation (EC) No 1927/2006 on establishing the European Globalisation Adjustment Fund; later Regulation (EU) No 1309/2013 of the European Parliament and of the Council of 17 December 2013 on the European Globalisation Adjustment Fund (2014-2020) and repealing Regulation (EC) No 1927/2006.

[3] Regulation (EU) No 1309/2013.

[4] The original threshold was set at 1,000 redundancies required to trigger access to EGF funding but this was reduced to 500 redundancies over four or nine months to cover those regions with a high incidence of SMEs. The co-financing of measures was set at 50%, but this was raised to 65% until the end of 2011, as a special crisis measure. The EGF is available for cases of collective redundancies in a single enterprise and its suppliers, but also for redundancies in a large number of enterprises, in particular SMEs, operating in a single economic sector and located in one Nomenclature of Territorial Units for Statistics (NUTS) II region or two contiguous NUTS II regions.

[5] In fact, the key difference with the ESF is that the EGF provides one-off, time-limited, individual support geared to help workers who have suffered redundancy as a result of globalisation, while the ESF takes a more strategic, long-term perspective – anticipating and managing change.

On the basis of the overview of GB instruments and tools, **an original** methodological **approach tailored** on the specific case of the EGF has been elaborated and applied. It aims at providing an answer to the following questions:

- **who benefits** from the policy intervention;
- **how much** funding is **allocated** for the policy intervention;
- **what** the **potential or actual impact** of the **policy interventions** is.

Accordingly, the research has been implemented in three steps:

1. **context** analysis;
2. gender analysis of the **allocated resources**; and
3. **gender impact** assessment of adopted **measures**.

First, a **context analysis** has been carried out in order to **identify and quantify the gender equality challenges** in the EGF actual functioning (gender-sensitive goals) across the EU. The context analysis has been **based mainly on desk review** and has been supported by sound and recent data and information that are already available.

Second, an **overall assessment of allocated resources** has been conducted, with the support of **desk research and consultations** with informants. Third, the **gender impact** assessment of adopted measures has been conducted through **desk research and consultations** with infomants.

All in all, the assessment has been conducted adopting a desk-based research integrated by information gathered from informants. The consultations have been conducted with:

- **gender equality experts** in relevant Member States;
- **EGF** Managing Authorities in relevant **Member States**;
- **EGF** Managing Authority at the **European Commission**;
- **EU**-level **social partners**.

The consultations have covered the following issues: implementation, beneficiaries and sector of application, applications, and implemented measures.

Conclusions

Labour market data analysis across all Member States showed increasing participation, driven by the **rising participation of women and older workers** and an increase in unemployment, which shows that the assimilation between the behaviours of men and women in the labour market is growing. Furthermore, the analysis pointed to increasing poverty (for all and especially for women) and to **levelling down of gender gaps** in employment, wages, and working conditions. These common trends were identified across all Member States (including the seven selected Member States).

This analysis also demonstrated the relevant phenomenon of gender segregation by sector: **women** tend to work in some **sector**s (female-dominated: for instance, education, health, and social work) while men tend to work more in other sectors (male-dominated: for instance, manufacturing and construction). The former were **less directly exposed to the financial and economic crisis** than the latter. However, during the second part of the crisis, due to retrenchments in public expenditure, also female-dominated sectors were impacted.

This is one of the reasons why the EGF has been implemented more often in male-dominated sectors than in female-dominated ones. Other factors contribute to this result:

- the **size of the firms** involved in the interventions;
- the **prevailing productive structure** in different sectors;
- the **differentiated impact of the crisis** by sectors.

However, the analysis showed that the EGF **does not produce a direct negative effect** on gender equality, but an **indirect gender bias exists.** As a result, the participation in EGF-financed measures **of women among final beneficiaries is equal to 33%**. But this result is not comprehensive as **availability of monitoring and evaluation gender data** is **limited**.

The analysis of the EGF implementation in a gender perspective conducted in the seven selected Member States (Germany, Greece, Finland, Poland, Romania, Ireland, and Spain) pointed to other relevant results:

- the **measures implemented** through EGF interventions **do not differ** between male-dominated sectors and female-dominated ones, concerning mainly vocational training and career counselling;
- **tailor-made measures** are the most **successfu**l;
- **women** tend to **participate more** than men in measures;
- some interventions, especially when implemented in female-dominated sectors, include **gender-relevant measures** (mainly specific measures **for carers**) and, in this case, a specific budget was set and women are those who benefitted the most from it;
- **no other significant difference** in the expenditure by gender has been reported at Member State level;
- **commitment to gender desegregation** for training measures is **not common**.

The study also revealed the pivotal role that **Managing Authorities at Member State** level play in encouraging, starting, and effectively managing **new applications** in a general and in a specifically gender-sensitive manner.

Social partners at EU level pointed out that the degree of their direct involvement in the EGF implementation is **not completely satisfactory**, and should be improved. Moreover, also the involvement of social partners at Member State level should be further encouraged as the potential contribution of social partners at any level in the design, implementation, and monitoring/evaluation of the whole EGF intervention would be relevant.

Recommendations

In line with the findings from the study, recommendations for action at EU and Member State level are put forward.

Member States should be encouraged, by means of an appropriate concrete support, including additional resources, **to implement a more careful data collection** from a **gender perspective** to properly monitor the achievement of women's economic independence in accordance with the Sustainable Development Goals and the Europe 2020 strategy requirements.

Member States and the European Commission should be invited to **monitor and neutralise all factors** that have been identified as major causes of the **indirect gender bias.**

Member States and the European Commission should **encourage the implementation of the EGF in female-dominated sector**s, especially those where the EGF has not been implemented so far, including public healthcare, public education, and public social care.

More in general, in all EGF implementation cases, the **European Commission should also use incentives and award criteria** for Member States that adopt gender-relevant measures aimed at promoting women's participation in the EGF.

Moreover, the **European Commission and Member States** should be encouraged to **promote** the **participation of social partners** at EU level and in Member States in design, implementation, and monitoring/evaluation activities of the EGF with a view to mutual learning, ownership of the measures, and raising awareness on the benefits of gender mainstreaming in the implementation of EGF measures.

1. EUROPEAN WOMEN AND THE ECONOMIC CRISIS

KEY FINDINGS

- The impact of the economic crisis has been different across EU Member States. However, common trends from a gender perspective can be identified: the activity rate indicator (15–64 years) has been on the increase since 2008 in most Member States, and this is mainly due to **the rising** labour market **participation** of **women and older workers**; **unemployment rates** have **increased**; young people not in education, employment and training (**NEETs**) in the youngest cohorts have **increased during the crisis** in the majority of Member States; **poverty** measured in terms of material deprivation has **increased**, the unadjusted pay gap declined in the majority of European countries due to the **levelling down of men's earnings** rather than the growth of women's earnings;
- **Gender segregation** in **economic sectors** is still evident in many EU Member States: **women** are more concentrated in the **general government sector** (which includes education, health and social work, and the public administration) whereas in the construction and the manufacturing sectors more male workers are found in all countries characterised by advanced economies.
- **Women** tend to work in **sectors** that have **not** been **hit directly** by the **recession**, such as education, health and social work, and the public administration (general government), **but** these sectors generally **experience difficulties in the case of debt restructuring** due to cuts in public services.
- A relevant impact on the sub-index of the **GEI** (Gender Equality Index) **calculated** for the **sub-domain of work** emerges (henceforth 'Sub-index Work') as, between 2005 and 2012, the **gap between EU-28 Member States** has significantly **increased** and the **marginal increase in the top score** is **higher** than that **in the lowest score**.

1.1. Labour market gender trends in EU-28 Member States

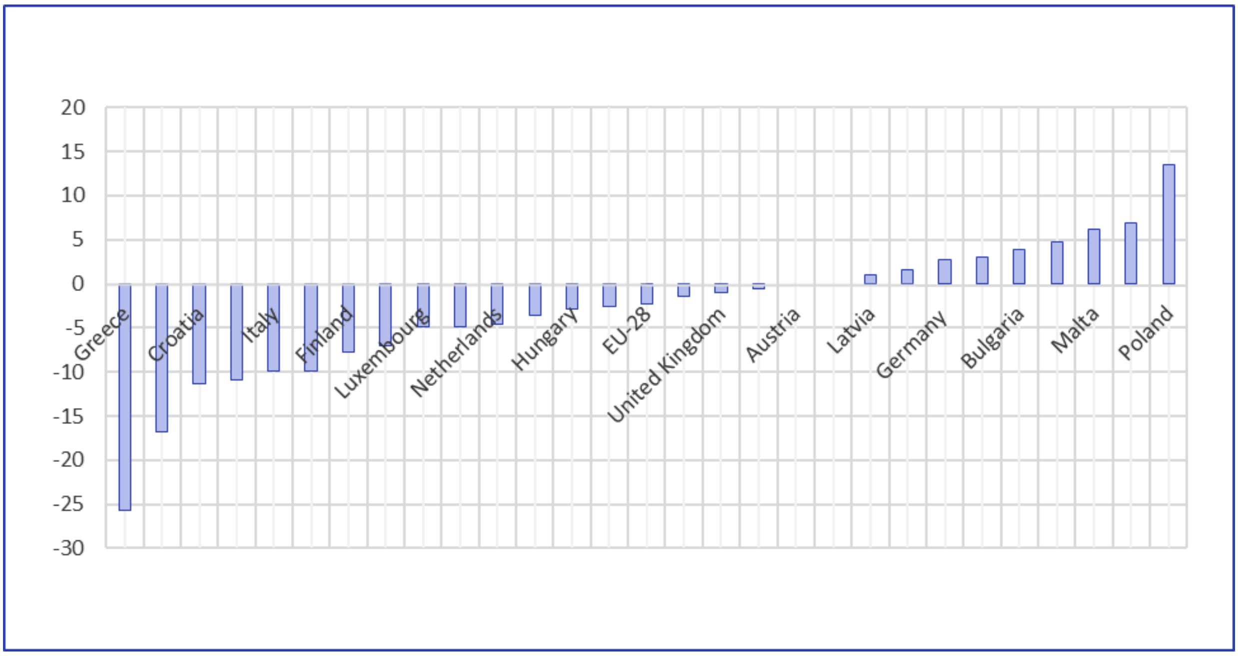
1.1.1. The impact of the crisis on the EU-28 economy

The impact of the economic crisis on EU-28 Member States has not been the same. Some Member States have never actually exited the first recession (Ireland, Greece, Portugal, Italy, Spain, and Croatia) while the majority of the EU-28 Member States have experienced a **double-**dip recession (with the second dip reached in 2012); some countries have been on a consistent pathway to employment recovery for some time (such as the Baltic States), while **the majority of countries have experienced a fragile and uncertain recovery**. More clearly, between 2008 and 2013 the GDP per capita decreased for most Member States (18) and remained unchanged in two (Austria and Sweden); it increased in the remaining eight (in the order: Poland, Lithuania, Malta, Slovakia, Bulgaria, Romania, Germany, Estonia, and Latvia). In 2014 the GDP was still below the pre-crisis levels in many countries and this is especially the case for Italy, Spain, Portugal, Greece, Slovenia, and Finland. This result is particularly worrying if compared to the recession of the 1990s[6], which was milder but had

[6] In the 1990s, most EU countries experienced only one year of negative growth and after five years, real GDP had increased by 5% to 15%, with the exception of Sweden and Finland, which experienced long and deep recessions.

remarkable long-term effects on employment rates, which declined and took several years to recover, notably in the Nordic countries[7].

Figure 1: Change in GDP per capita – growth rate 2008–2013



Source: Own calculations on Eurostat data.

1.1.2. (In)activity rates and (un)employment rates

Economic participation, as measured by the activity rate indicator (15–64 years), has been on the **increase since 2008 in most Member States**, in contrast to the experience in past recessions. The activity rate in EU-28 increased slightly from 77.8% in 2008 to 77.9% in 2013 compared to 2008 for men (in 13 Member States: Austria, Czech Republic, Estonia, France, Germany, Hungary, Lithuania, Luxembourg, Malta, Poland, Romania, Slovakia, and Sweden) and **consistently for women from** 63.6% to 66.0% (this was the case of all Member States with the only exception of five Member States – Croatia, Denmark, Finland, Ireland, and Slovenia). It implies that the **drop in the number of jobs mainly translated into a rising number of unemployed** and, only to a limited extent, a rising number of 'discouraged workers'. This positive trend was confirmed for 2014 when the activity rate reached 78.1% for men, with a positive increase since 2008 in 14 Member States (Austria, Bulgaria, Czech Republic, Estonia, France, Germany, Hungary, Lithuania, Luxembourg, Malta, Poland, Romania, Slovakia, and Sweden) and 66.5% for women on the EU-28 average (a decrease in comparison to 2008 is found only in the following three Member States: Denmark, Ireland, and Slovenia).

The **increase in the activity rate** since 2008 has mainly been driven by the rising participation of women and older workers. As regards **women**, this is due to a number of factors: structural increases in their activity rate due to the rising levels of education for women; policy measures designed to encourage increased female participation, and the fact

[7] European Commission, Social Situation Monitor, *Scarring effects of the crisis*, Research note 06/2014.

that the **initial labour market shock did not hit women as strongly as 35–50 year-old men**.

The reason for this is that **women tend to work in sectors** (for instance education, health and social work, or more generally the public sector) that are **less likely to be hit directly by the recession** than male-dominated sectors (manufacturing and construction). They are more likely to experience difficulties in the case of debt restructuring due to cuts in public services. This seems to explain most of the better performance of women's employment during the first part of the economic crisis and has brought the behaviour of women in the labour market much closer to that of men with a rising share of dual-earner households[8].

Activity rates have increased while **employment rates** (age 15 to 64) show an opposite trend during the crisis. The EU-28 average in 2008 stood at 72.6% for men and at 58.9% for women. It **went down for men to 69.4% in 2013 and slightly recovered to 70.1% in 2014**, while it **slightly decreased for women to 58.8% in 2013** and even **increased up to 59.5% in 2014**[9]. **In the majority of Member States, the target set by the Europe 2020 strategy** (75% for total employment) **looked further away after the crisis than** it was **before**.

The **unemployment rate** (age 15+) **for men** stood at 6.6% in EU-28 on average **in 2008,** peaked to 10.8% in 2013, and decreased to 10.1% in 2014. This rate **was below 7% in the majority of Member States** (20 out of 28) in 2008[10] but then rose dramatically during the crisis in most of them[11]. **For women**, the EU-28 average for the unemployment rate (15+) stood at 7.5% in 2008 and reached 10.9% in 2013; in 2014 it slightly decreased to 10.3%[12]. For both men and women, some improvement can be noticed in 2014[13].

The increase in **long-term unemployment** (defined as person without work for 12 months or longer for the age group 15–74) during the economic crisis has been worrying. The EU-28 average stood at 2.4% for men and at 2.8% for women in 2008. Values for 2013 more than doubled those of five years before (respectively 5.2% and 5.1%). It slightly decreased for men to 5.1% and remained the same for women in 2014[14]. In many Member States, the increase is noteworthy, reaching values even higher than 10 percentage points (p.p.) in two Member States[15]. **Given the slow pace of economic recovery in most countries, there**

[8] See Bettio et al. (2013).

[9] Before the recession began, employment rates for women were above 60% in 15 Member States (Austria, Cyprus, Denmark, Estonia, Finland, France, Germany, Ireland, Latvia, Lithuania, Netherlands, Portugal Slovenia, Sweden, and United Kingdom), but this number was down to 11 (Austria, Denmark, Estonia, Finland, France, Germany, Latvia, Lithuania, Netherlands, Sweden, and United Kingdom) in 2013. The employment rate for men was above 70% in 21 Member States in 2008 (with the only exception of Belgium, Bulgaria, France, Croatia, Cyprus, Lithuania, Hungary, Poland, and Romania) and only in 10 Member States in 2013 and in 2014 (the Member States are the same for 2013 and 2014: Austria, Czech Republic, Denmark, Estonia, Germany, Luxembourg, Malta, Netherlands, Sweden, and United Kingdom).

[10] The male unemployment rate was below 7% in all Member States in 2008, with the only exceptions of: Croatia, Germany, Hungary, Ireland, Latvia, Portugal, Slovakia, and Spain.

[11] The male unemployment rate was below 7% only in six Member States in 2013: Austria, Czech Republic, Denmark, Germany, Luxembourg, and Malta.

[12] In 2008, the rate was below 7% in 16 Member States (Austria, Bulgaria, Czech Republic, Denmark, Estonia, Finland, Ireland, Cyprus, Lithuania, Luxembourg, Malta, Netherlands, Romania, Slovenia, Sweden, and United Kingdom). In 2013, it was below 7% only in six Member States (Austria, Czech Republic, Denmark, Germany, Luxembourg, and Malta).

[13] The situation seemed to improve in 2014 for both women and men: the Member States with a male unemployment rate below 7% were seven (Austria, Czech Republic, Denmark, Germany, Luxembourg, Malta, and United Kingdom) while those with a female unemployment rate below 7% were five (Austria, Germany, Luxembourg, Malta, and Romania).

[14] Only in Germany, long-term unemployment diminished within this time span for both men (-1.4%) and women (-1.7%) and in Luxembourg only for women (-0.2%).

[15] In Greece and Spain, the increase in long-term unemployment reached respectively 14.1 p.p. and 11.1 p.p. for men, and 15.5 p.p. and 10.7 p.p. for women. In other Member States, the increases in the rates ranged between

is thus a serious risk that many long-term unemployed will remain without a job for a long time. It should also be noted that 20% of the long-term unemployed in 2013 have never worked before and are mainly young people.

In this regard, it should be noted that the EU-28 average in long-term unemployment among young people (15–24 years of age) increased more than for the 15–74 age group. For men in 2008, it stood at 3.7% but it reached 8.6% in 2013 and slightly decreased to 8.5%. For women in 2008, it stood at 3.3%, reached 7.2% in 2013, and slightly decreased to 7.0%. The **change** in **long-term unemployment between 2008 and 2013 among young people** (15–24 years of age) reached 4.9 p.p. for men and 3.9 p.p. for women[16].

Young people, especially those who have achieved only a **low educational level** (second International Standard Classification of Education – ISCED – level) are **at higher risk of remaining in unemployment for a long term**. In any case, NEETs in the youngest cohorts have increased during the crisis: they were 9.7% in 2008, reached 12.8% in 2013, and went down to 12.3% in 2014 among men. Among women, they were 12.0% in 2008, increased up to 13.2% in 2013, and slightly decreased to 12.7% in 2014[17].

Long-term unemployment is one of the main drivers of poverty and social exclusion. In fact, **poverty** measured in terms of **material deprivation** has **increased** during the crisis. The EU-28 average is available for both women and men since 2010, and for that year it stood at 18.5% for women and 17.3% for men. It increased up to 20.3% for women in 2012 and to 19.1% for men. Material deprivation began to slow down in 2013 when it stood at 20.1% and 18.9% for women and men, respectively, and this tendency was confirmed for 2014 when it reached 19.1% for women and 17.9% for men. **European women suffer** from a **higher risk of poverty or social exclusion** than European men, at least since 2005 (Bettio et al., 2013). As noted above, however, **the current economic crisis has (slightly)**

5.0 p.p. and 10.0 p.p. for men (Bulgaria, Cyprus, Croatia, Ireland, and Portugal) or women (only Cyprus). Other countries showed lower increases between 2.0 p.p. and 5.0 p.p. (for men this happened in Estonia, Italia, Latvia, Lithuania, and Slovenia; for women this happened in Bulgaria, Croatia, Cyprus, Italy, Ireland, Latvia, Lithuania, and Slovakia). The negative trend is found again for 2014 in eight Member States (Austria, Belgium, Cyprus, Finland, France, Greece, Italy, and Netherlands) for men, and in 10 Member States (Austria, Belgium, Cyprus, Croatia, Finland, Greece, Italy, Netherlands, Slovenia, and Spain) for women.

[16] This change scored the highest rates, above 10% in seven Member States for young men (Croatia, Greece, Ireland, Italy, Portugal, Slovakia, and Spain) and in four Member States for young women (Croatia, Greece, Italy, and Spain). In other four countries for men and five countries for women, the change was between 5% and 10% (Bulgaria, Latvia, Poland, and Slovenia for men, and Bulgaria, Ireland, Portugal, Slovenia, and Slovakia for women). The change was instead between 2.0% and 5.0% in five Member States (Belgium, Czech Republic, Estonia, Hungary, and United Kingdom) for men and in six Member States (Czech Republic, France, Hungary, Poland, Romania, and United Kingdom) for women. Minor variations (0.0% and 2.0%) have been recorded in five Member States (Austria, France, Netherlands, Romania, and Sweden) for men and in three Member States (Austria, Belgium, and Netherlands) for women.

[17] The average increases in EU-28 between 2008 and 2013 amounted to 3.1 p.p. among men and to 1.2 p.p. among women. Between 2008 and 2013, male NEETs increased by more than 10% in two Member States (Greece and Cyprus). An increase between 5% and 10% was recorded: for young men in six Member States (Bulgaria, Croatia, Italy, Portugal, Romania, and Spain); for young women in three Member States (Croatia, Cyprus, and Greece). Other countries recorded increases between 2% and 5%: for young men in 13 Member states (Belgium, Czech Republic, Estonia, Finland, Hungary, Latvia, Lithuania, Malta, Netherlands, Poland, Slovenia, Slovakia, and United Kingdom); for young women in six Member States (Czech Republic, Hungary, Portugal, Romania, Slovenia, and Spain). Smaller increases, below 2%, have been noticed in six Member States for young men (Austria, Denmark, France, Ireland, Luxembourg, and Sweden) and in 12 Member States for young women (Belgium, Bulgaria, Denmark, Finland, France, Ireland, Lithuania, Malta, Netherlands, Poland, Slovakia, and United Kingdom). Only in Germany the share of NEETS decreased for both young women and men, while in Austria, Latvia, Luxembourg, and Sweden the share decreased among young women only. Between 2013 and 2014, a decreasing trend was recorded in the majority of Member States for both men and women. The exceptions were Austria, Croatia, France, Luxembourg, and Sweden for young men, and Bulgaria, Finland, Germany, Luxembourg, Malta, the Netherlands, Romania, and Slovenia for young women.

reduced the gender gaps in poverty by **increasing the risk among men more than among women** (Bettio et al., 2013).
The analysis of the abovementioned indicators shows that **the economic crisis in Europe** has had three types of **gender impacts**:

- **gender gaps in employment** have been **levelled down** and an **increase in poverty** has emerged;
- the **process of assimilation between the behaviours of men and women** in the labour market has been accelerated;
- **men have suffered the fall in employment the most,** and **male unemployment** has **risen more;**
- as a **combined result** of employment and unemployment patterns, **activity has fallen among men** and **risen among women**;
- the **share of NEETs** aged 15 to 24 has **increased especially among men**.

The crisis has also had another important effect: the **retrenchment of the expenditure in welfare and social security provisions due to the fiscal consolidation**, especially in the countries most affected by the sovereign debt crisis (Bettio et al., 2013). These retrenchments have **impacted on women's living conditions** in two different ways: **reducing the opportunities to find a job** in the labour market, especially for women working in welfare services with temporary contracts, and as **beneficiaries of welfare services** that have become less accessible.

1.1.3. Gender pay gap

EU-28 comparable data for the **unadjusted gender pay gap** are available starting from 2010 when the EU-28 average stood at 16.1%. Between 2010 and 2012, the gender pay gap increased up to 16.6% for the EU-28 average, and then it started to decline down to 16.4% in 2013 and 16.1% in 2014. A significant part of the gender gap is in each country explained by the sector of employment: women are over-represented in sectors with low pay levels (education, health, and social work as examples) while men are over-represented in better paid sectors (construction and chemical products, for instance). Other relevant factors are the firm size (the higher the number of employees, the smaller the gap), education, and occupational segregation (Boll et al., 2016).

The recent prevailing trend of reduction, however, is **related to the levelling down of men's earnings** related to the economic crisis rather than the growth of women's earnings, as well as to the downside of falling earnings (and income) for both men and women (though there is a lesser fall for women) again related to the economic crisis. As stated by Bettio et al. (2013): 'Three main factors have contributed to the decline in the gender pay gap: cuts in the extra wage components of pay packets, sectoral segregation and in some countries, equal pay policy. The first two may not outlast the crisis, while the third may maintain longer-lasting progress.'[18]

Over-representation in service employment, including **general government sector jobs**, and under-representation in manufacturing, construction, and male-dominated branches of the financial sector – in short, **sectoral segregation** – **sheltered women's employment**, activity, and, to some extent, pay **during the first phase of the downturn**.

In any case, **a lower gender pay gap** in this case, rather than being consistent with the idea of progress in gender equality, represents the **downside of falling earnings** (and income) **for both women and men** (though there is a **lesser fall for women)**.

[18] Bettio et al. (2013), p. 100.

1.1.4. Gender segregation in the labour market

As far as gender segregation is concerned, a clear definition of the phenomenon needs to be provided. Gender segregation is the **tendency for men and women to do different jobs according to their gender**, and this is a pervasive phenomenon across Europe (Burchell, Hardy, Rubery and Smith, 2013; Bettio and Verashchagina, 2009; Emerek et al., 2002; Rubery et al., 1999) and across the world (Anker, 1997 and 1998). It is related to the phenomenon of **gender stereotyping** (Grésy, 2015)[19], which shapes the educational and consequently job choices of individuals.

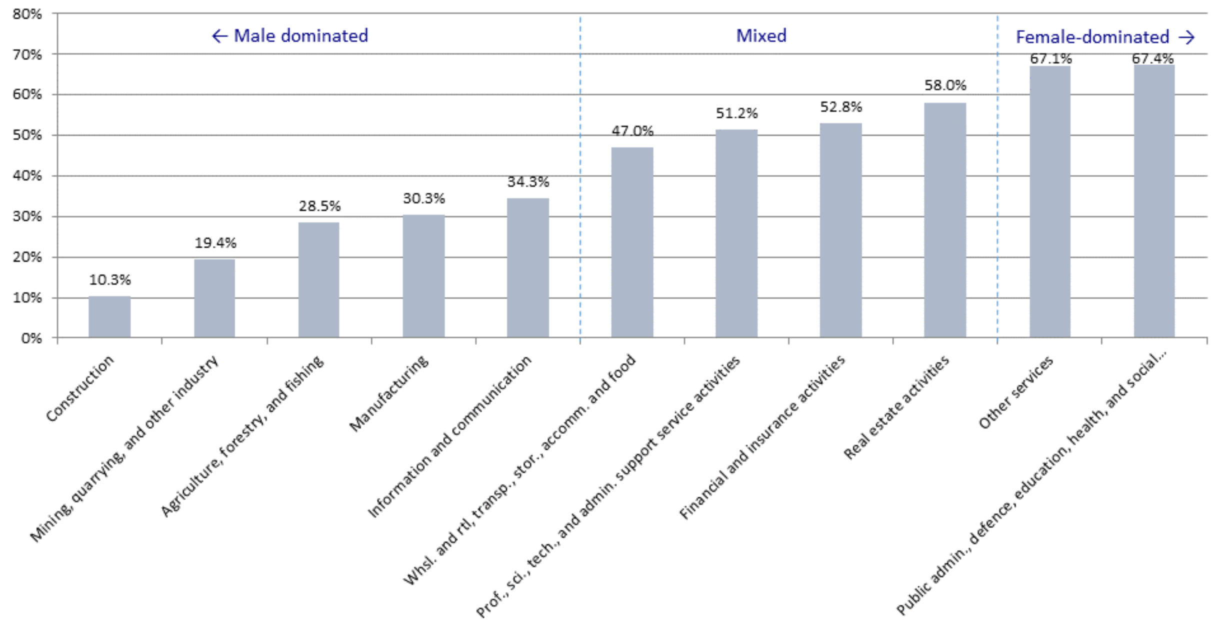
Segregation is often analysed in relation to occupations, but also applies to sectors, workplaces, and forms of employment contract. In the present report, the main focus is on gender segregation by sectors. The degree of segregation varies; it ranges from situations in which sectors are dominated by one sex, to weaker forms of segregation where one sex is just over-represented in relation to the share of total employment. The **increasing** integration of **women** into **employment** has been associated with some **reduction in segregation** and the growth of more mixed occupations (Bettio and Verashchagina, 2009) **but also with new and emerging forms of segregation**, including greater differentiation within an occupation (Bettio and Verashchagina, 2009; Crompton and Sanderson, 1990; Grimshaw and Rubery, 2007).

In particular, sectoral segregation also matters more where there are strong pay differentials. As mentioned before, sectors with low pay levels (education, health, and social work as examples) feature a high share of female employment, while better-paid sectors (construction and chemical products, for instance) present a higher concentration of male employment.

Other relevant factors of gender sectoral segregation are the firm size (the higher the number of employees, the smaller the gap), education, and occupational segregation (Boll et al., 2016). According to Burchell et al. (2013)[20], **data on feminisation** of economic **sectors** show a clear differentiation in the EU. Women are **more concentrated in the public administration**[21] (67.4% in 2010, EU-27 average), followed by: **other services** (67.1%)[22]; **real estate activities** (58.0%); **financial and insurance activities** (52.8%); **professional, scientific, technical, administration, and support service activities** (51.2%); wholesale and retail trade, transportation, storage, accommodation, and food service activities (47.0%); information and communication (34.3%); manufacturing (30.3%); agriculture, forestry, and fishery (28.5%); mining, quarrying, and other industry (19.4%); and construction (10.3%).

[19] Grésy, B. (2015), 'Challenging stereotypes and everyday sexism' in Bettio, F. and Sansonetti, S. (2015) (eds.), *Visions for Gender Equality*, European Commission, pp. 29–32.
[20] In Burchell et al. (2013) p.: 87.
[21] In this case, public administration includes the following: defence, education, health, and social work.
[22] The category 'other services' includes, for instance, cleaning and maintenance. It includes all services but: information and communication; wholesale and retail, transport, storage, accommodation, and food; professional technical and administrative support services; financial and insurance activities; real estate activities; and public administration, defence, education, health, and social work.

Figure 2: Percentage of female employees by industrial sector – EU-27, 2010



Source: Burchell et al. (2013): p.87. Courtesy of the authors.

An **indicator for gender segregation by sector is calculated by Eurostat for the European Commission** every year[23]. Segregation by economic sectors in 2008 in EU Member States ranged between 15.5% in Greece and 25.8% in Estonia), with an average value of 20.2[24]. In **2013** the **minimum** value was achieved again by **Greece** (13.9%) and the **maximum in Estonia** (25.0%) and the average EU value was 19.0%.[25]. Between 2008 and 2013, the indicator increased in the majority of Member States (eighteen) and decreased in the remaining ten[26]. In 2014 compared to the previous year, a decrease was registered in the majority of Member States (seventeen)[27].

During the crisis, the differences among EU Member States have reduced: this reduction has to be related to **the shortage of occupations in sectors that are strongly gendered** (such as manufacture and construction, which are typically male-dominated).
Segregation between the public and the private sector, too, is **highly relevant** in respect to **gender**. Data on employment by sector show that sectors covering public services have the highest share of female employment while construction has the lowest, and this is

23 It is defined as the average national share of employment for women and men applied to each sector; differences are added up to produce the total amount of gender imbalance expressed as a proportion of total employment (Statistical Classification of Economic Activities in the European Community – NACE – classification). Data for Croatia were not available for 2008.

24 There were only three countries showing a value for the sectoral segregation indicator below or equal to 17.5% (Greece, Malta, and Romania). Twelve countries presented a value between 17.5% and 19.5% (Austria, Belgium, Czech Republic, Germany, Denmark, France, Hungary, Italy, Lithuania, Netherlands, Slovenia, and United Kingdom), only three cases between 19.5% and 21.5% (Cyprus, Poland, and Spain) and the remaining eight Member States presented a share included between 21.5% and 23.5% (Bulgaria, Finland, Ireland, Lithuania, Latvia, Portugal, Sweden, and Slovakia).

25 There were again four Member States showing a value below 17.5% (Greece, Luxembourg, Malta, and Romania) other four countries presented values ranging between 23.0% and 25.0%: Finland, Lithuania, Latvia, and Slovakia. The other nineteen Member States presented a sectoral segregation value between 18.0% and 21.5%.

26 It decreased in Bulgaria, Cyprus, Estonia, Greece, Croatia, Ireland, Luxembourg, Portugal, Spain, and Sweden.

27 Austria, Demark, Finland, France, Germany, Greece, Hungary, Ireland, Lithuania, Malta, the Netherlands, Portugal, Slovakia, Slovenia, Spain, Sweden, and the United Kingdom. It remained unchanged in Cyprus, Czech Republic, and Croatia.

the case in all countries characterised by advanced economies[28] (Bettio and Verashchagina, 2009; Burchell, Hardy, Rubery and Smith, 2013).

The following two graphs are extrapolated from the report by Burchell et al. (2013, pp: 89-90), and present the situation of gender segregation by sectors in EU-27 in 2010[29].

The authors commented that **Figure 3** (segregation by sector and country, women) shows that **some countries '**appear much less segregated as far as sector is concerned', while others **'appear more sector-segregated' for women's employment**. In particular, women working in female-dominated sectors are the majority in **Finland,** Belgium, France, Sweden, and Denmark. While in the order in **Greece**, Bulgaria, Luxembourg, Cyprus, and Romania, women working in these sectors are a minority[30]. By the way, Greece is the country with the highest share of women working in mixed sectors, followed by Bulgaria, Luxembourg, Cyprus, **Romania**, Malta, and Lithuania.

As regards **men's employment**, **Figure 4** shows a much higher percentage of men working in mixed sectors or in male-dominated sectors than what is shown in Figure 3 for women working in mixed sectors or female-dominated sectors. In the order in **Greece, Lithuania, Romania, Bulgaria, and Portugal**, **'there are fewer men working in a female-dominated sector'** and, at the same time, the **highest share of men working in mixed sectors** compared to other countries.

An additional observation regards the fact that the share of men and women who respectively work in a sector dominated by their sex does not differ so much. Still, more men are working in female-dominated sectors than women in male-dominated sectors. **More gender equality in the labour market would imply** that **all sectors would be more mixed** than what the graphs show now: where sectors appear to be female or male-dominated.

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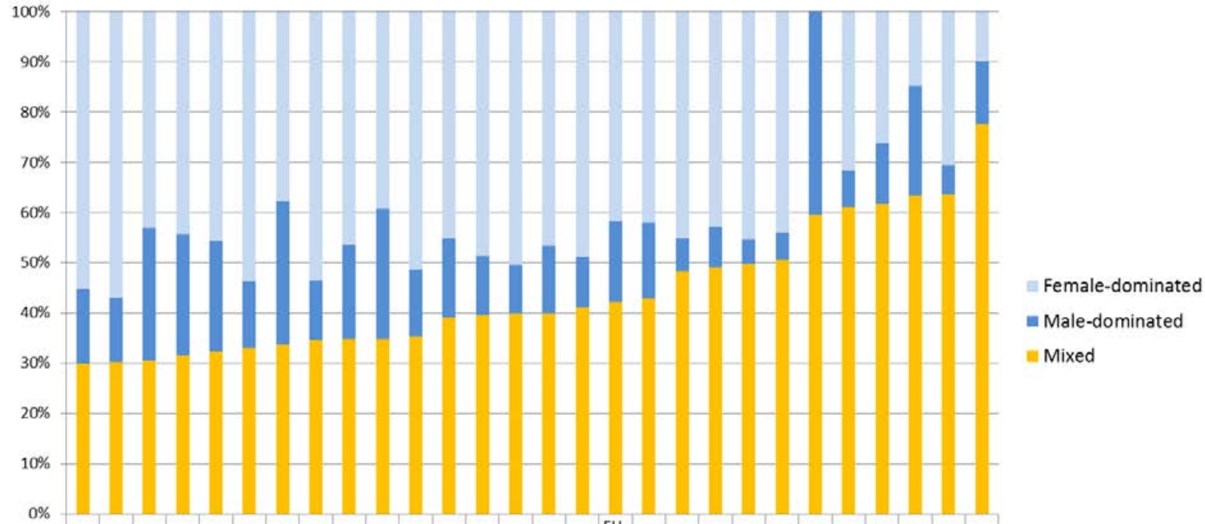
28 Advanced economies is the definition adopted by the International Monetary Fund (IMF) in the yearly publication 'World Economic Outlook' for countries that feature high: 1) per capita income level; 2) export diversification – so oil exporters that feature high per capita GDP would not fall under the advanced classification because around 70% of their exports are represented by oil; and 3) degree of integration into the global financial system. The definition is available at: https://www.imf.org/external/pubs/ft/weo/faq.htm#q4b.

29 The methodology for choosing the relevant sectors is defined by the authors as follows: 'This method for analysing the separate effects of gender and occupational gender segregation was developed for the *Gender and working conditions* report of the 2010 European Working Conditions Survey (Eurofound, 2013). This concentrated on the 20 most common International Standard Classification of Occupations (ISCO-08) 2-digit occupations, and ranked them on a continuum from the most male-dominated (building workers) to the most female-dominated (personal care workers).' (Burchell et al., 2013, p. 35) The complete list of the 20 chosen occupations is included in Burchell et al., 2013, Appendix D. For 2005 and 2010 they include: sales workers; business and administration associate professionals; teaching professionals; personal service workers; drivers and mobile plant operators; building and related trades workers; metal, machinery, and related trades workers; science and engineering associate professionals; cleaners and helpers; market-oriented skilled agricultural workers; personal care workers; numerical and material recording clerks, etc.
The authors also specified that: 'The cut-off points of 40% and 60% are chosen for two reasons. First, this is a commonly used division in the literature. Second, it is intuitively reasonable; if the cut-off points are shifted to 30% and 70%, then an occupation could have more than twice the number of men as women and still be labelled as "mixed"' (Burchell et al., 2013, p. 36).

30 The result for Malta has to be taken with caution.

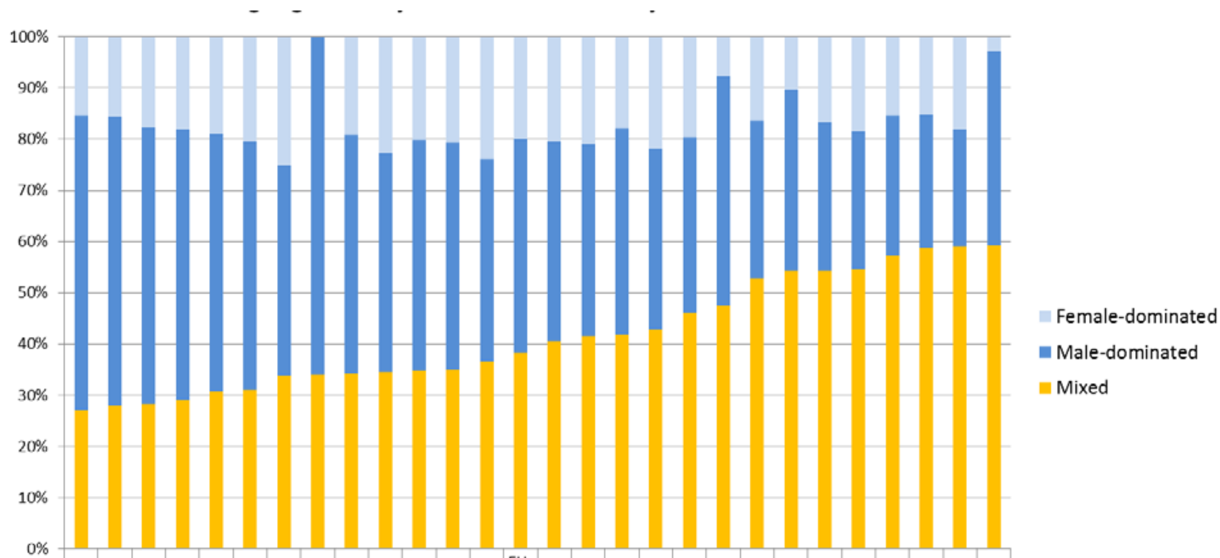
Figure 3: Segregation by sector and country, women – EU-27, 2010



	FI	BE	SI	HU	PL	FR	CZ	SE	IT	SK	DK	DE	IE	NL	ES	UK	EU-27	AT	EE	LV	PT	LT	MT	RO	CY	LU	BG	GR
Female-dominated	55%	57%	43%	44%	46%	54%	38%	54%	46%	39%	51%	45%	49%	50%	47%	49%	42%	42%	45%	43%	45%	44%	0%	32%	26%	15%	31%	10%
Male-dominated	15%	13%	26%	24%	22%	13%	29%	12%	19%	26%	13%	16%	12%	10%	13%	10%	16%	15%	7%	8%	5%	5%	40%	7%	12%	22%	6%	12%
Mixed	30%	30%	31%	32%	32%	33%	34%	35%	35%	35%	35%	39%	40%	40%	40%	41%	42%	43%	48%	49%	50%	51%	60%	61%	62%	63%	64%	78%

Source: Burchell, et al. (2013): p. 89. Courtesy of the authors.

Figure 4: Segregation by sector and country, men – EU-27, 2010



	CZ	SK	PL	SI	HU	IT	BE	MT	FI	ES	AT	DE	FR	EU-27	DK	IE	SE	NL	UK	LU	LV	CY	EE	PT	BG	RO	LT	GR
Female-dominated	15%	16%	18%	18%	19%	21%	25%	0%	19%	23%	20%	21%	24%	20%	21%	21%	18%	22%	20%	8%	16%	10%	17%	18%	16%	15%	18%	3%
Male-dominated	57%	56%	54%	53%	50%	48%	41%	66%	47%	43%	45%	44%	39%	42%	39%	38%	40%	35%	34%	45%	31%	35%	29%	27%	27%	26%	23%	38%
Mixed	27%	28%	28%	29%	31%	31%	34%	34%	34%	35%	35%	35%	37%	38%	41%	42%	42%	43%	46%	47%	53%	54%	54%	55%	57%	59%	59%	59%

Source: Burchell, et al. (2013): p. 90. Courtesy of the authors.

However, **employment segregation** has **played a different role in different country contexts**. Sometimes, it has **sheltered women's jobs and wages during the crisis**. In other cases, **employment segregation** has played also the opposite role of exposing women more than men to the effects of the crisis. This happened especially during the second part of the crisis when **fiscal consolidation has significantly curtailed welfare-type**

jobs and employment in the general government sector (Bettio et al., 2013). The public sector had a relevant impact because in **2013** it **accounted** for '**more than 25% of total employment** and a significant share of economic activity in the **EU Member States**'[31]. **Existing data** show that the general government sector – including the public administration and the provision of welfare services – is the **main employer** of working **women** in **many EU Member States.**

Another aspect that is relevant for the purpose of the present assessment is **the size of enterprises by sector**. In **EU economies large enterprises** employ 41.0% of the manufacturing workforce (which is prevalently male-dominated)[32] and only 33.0% of the non-financial business economy workforce (which is female-dominated)[33]. On the other hand, **the main sector of activity for SMEs** (small and medium enterprises) **was the distributive trade sector (28.0%), which is more feminised** (with a share of women employees equal to 47.0%)[34].

This factor, when **interacting with gender segregation** by economic sector, **may favour** a phenomenon of **indirect gender bias in the implementation of EGF**; this issue is explored in depth in Chapter 2 and Chapter 3 of the present report.

1.1.5. Gender Equality Index by EIGE: comparative analysis of data from the total GEI and the work-related sub-index, years 2005–2012

There appears **not to be a clear relation between the GEI** developed by the European Institute for Gender Equality (EIGE) and the **changes in the socio-economic conditions in Member States**, while a relevant impact on the Sub-index Work emerges. This is due to the fact that the GEI calculation takes into account also other relevant developments in gender equality besides living conditions (for instance, improvements in the area of political representation by introducing quotas might have a relevant positive impact without any immediate improvement on women's living conditions), and in any case the impact of the economic crisis on gender equality might be mediated by the lowering of institutional capacity devoted to promoting gender equality at country level (so cuts in public spending that affected the institutional capacity for gender equality might entail future negative impacts on gender equality). As stated in the last publication concerning GEI: 'The Gender Equality Index is a composite indicator that provides a measure — across Member States and over time — of the complex concept of gender equality. It measures gender gaps within a range of areas relevant to the EU policy framework (work, money, knowledge, time, power, health, violence and intersecting inequalities).' (EIGE, 2015, p.7)

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31 European Commission (2013), *European Public Sector Innovation Scoreboard 2013*, p. 4, available at: http://www.technopolis-group.com/wp-content/uploads/2014/06/1540_EIS-2011-12_EPSIS-2013.pdf.

32 In 2012, large enterprises (employing 250 or more people) contributed more to the EU-28 manufacturing sector, and just over half (55.7%) of the manufacturing sector's value added was generated by 15,900 large enterprises. Eurostat Structural business statistics, Statistics Explained, *Manufacturing statistics – NACE Rev. 2*, available at: http://ec.europa.eu/eurostat/statistics-explained/index.php/Manufacturing_statistics_-_NACE_Rev._2#Sectoral_analysis (visited on 26 February 2016).

33 In 2012, the non-financial business economy average for large enterprise was a 42.5% share of value added. Eurostat Structural business statistics, Statistics Explained, *Manufacturing statistics – NACE Rev. 2*, available at: http://ec.europa.eu/eurostat/statistics-explained/index.php/Manufacturing_statistics_-_NACE_Rev._2#Sectoral_analysis (visited on 26 February 2016).

34 More than one quarter (28.0%) of SMEs within the EU-28 non-financial business economy in 2012 were active within the distributive trade sector; this sector also provided work to more than one quarter (25.9%) of the SME workforce in the EU-28 non-financial business economy. Eurostat Statistics Explained, *Business economy – size class analysis*, available at: http://ec.europa.eu/eurostat/statistics-explained/index.php/Business_economy_-_size_class_analysis#Sectoral_analysis (visited on 26 February 2015).

One of the most significant results concerning the **Sub-index Work** is that during the reporting period **the differences among EU-28 Member States have significantly increased**.

The Gender Equality Index

The **GEI measures gender gaps adjusted for levels of achievements in gender equality** in each Member State. Values available over the time of crisis do not show a generalised direct relation between the socio-economic conditions and trends in gender equality in all Member States as the GEI is the synthesis of developments in different areas.

Before describing the trends, it is necessary to recall that **the index is built on the assumption that gender equality consists of 'the equal share of assets and equal dignity and integrity between women and men'**.

GEI includes sex-disaggregated indicators and takes into account the different levels of achievement in each Member State. A good score for Member State 'A' implies both low gender gaps and high levels of achievements in that Member State in relation to the best performing Member State in the reporting period.

Therefore, the GEI is not a pure measure of gender equality as it assumes that all individuals should have the opportunity 'to realize themselves to the fullest of their capacity'[35]. Adjusting the GEI for levels of achievements allows for the possibility of having a more realistic understanding of reality. **Changes due to the economic crisis mirrored in a generalised decrease in gender gaps in most EU countries**. However, this drop in gender gaps – i.e. improvement in gender equality – has not entailed the improvement in living conditions: it just meant that living conditions had worsened during the economic and financial crisis for all individuals, both women and men.

The **GEI produces a score that goes from 1 to 100**, where 100 represents the best situation in terms of levels of achievement and full gender equality. To achieve a high score it is necessary to guarantee reduced gender gaps as well as proximity to the best performing country for each indicator. The EU-28 score needs to be interpreted as the measure of gender gaps in relation to the level of social cohesion existing across Member States.

Data refer to the 2005–2012 period, using **2005, 2010, and 2012** as reference years.

As for EU-28, in 2005 it achieved an **average score of 51.3 out of 100 points**; this score has increased but not very significantly over the years as it is 52.4 in 2010 and 52.9 in 2012. These results show that the EU is only halfway towards the goal of combining gender equality and social cohesion.

Four countries have achieved a score that **significantly exceeded the EU average.** The first one is **Denmark**, whose score raised from 71.1 in 2005 to 72.7 in 2010, with a reduction in 2012 (70.9). The second one is **Finland**, whose score increased by 2.7 points between 2005 and 2012, when the GEI reached 72.7 points. The third one is the **Netherlands**, whose score increased by 5.5 points between 2005 and 2010 and then decreased to 68.5 in 2012, when the GEI reached 68.5 points. The Member State that has recorded the top score in the GEI is **Sweden**, which increased its score by 1.6 points between 2005 and 2010, followed by a small decrease, so that in 2012 the GEI score reached 74.2 points. The worst

[35] EIGE (2015), p. 75.

performance has been found in relation to Romania, whose GEI, which decreased by 2.3 points between 2005 and 2012, is far below the EU-28 average and is significantly decreasing over time (36.0 in 2005, 35.0 in 2010, and 33.7 in 2012). The comparison between the opposite trends found among the best performers and that of the worst performers makes it possible to conjecture a polarisation across Member States.

In the majority of Member States (20), an **overall improvement** between 2005 and 2012 was recorded (Belgium, Czech Republic, Germany, Estonia, Ireland, Greece, Spain, France, Italy, Cyprus, Latvia, Luxembourg, Hungary, Malta, Netherlands, Poland, Portugal, Slovenia, Finland, and Sweden) while **only in eight Member States** the index points to a **worsening** of gender equality in the same time span (Bulgaria, Denmark, Croatia, Lithuania, Austria, Romania, Slovakia, and United Kingdom). However, the analysis of trends shows a more composite picture[36].

Considering the abovementioned data**, there is no clear correlation between the financial and economic crisis and the GEI trend since some of the Member States more affected by the crisis do not show a significant decrease in the GEI score**: Italy, for example, is one of the Member States that reported a GEI increment of more than five points. Spain and Greece as well show an overall positive GEI trend in the period going from 2005 to 2012.

Table 1: Gender Equality Index for 2005, 2010, and 2012

Country	GEI		
	2005	2010	2012
Belgium	55.6	58.3	58.2
Bulgaria	42.3	38.1	38.5
Czech Rep.	40.3	42.1	43.8
Denmark	71.1	72.7	70.9
Germany	49.7	49.9	55.3

[36] The analysis by trends shows different scenarios. Ten Member States – Finland, Slovenia, Ireland, Germany, Estonia, Latvia, Cyprus, the Czech Republic, Poland, and Italy – followed the EU-28 trend, with a slight increase of the GEI in both the 2005–2010 and the 2010–2012 periods. Further nine Member States – Sweden, Denmark, the Netherlands, Belgium, France, Spain, Hungary, Greece, and Portugal – experienced a GEI increase between 2005 and 2010 and a decrease in the following period (2010–2012). Among them, in Denmark only the value for 2012 is lower than that scored in 2005. Four Member States – Luxembourg, Austria, Malta, and Bulgaria – experienced a decrease in the GEI in the 2005–2010 period and an increase in the following period (2010–2012). Two of them – Malta and Luxembourg – show an overall increase of the GEI in the reporting period, respectively of 3.4 points for Malta and of 1.5 points for Luxembourg between 2005 and 2012, whereas for the other two – Austria and Bulgaria – the overall trend between 2005 and 2012 is negative, respectively -0.3 points for Austria and -3.8 points for Bulgaria between 2005 and 2012. Finally, the GEI decreased in both periods (2005–2010 and 2010–2012) in five Member States: the United Kingdom with an overall decrease of four points between 2005 and 2012; Lithuania with an overall decrease of 3.4 points between 2005 and 2012; Croatia with an overall decrease of 1.8 points between 2005 and 2012; Slovakia with an overall decrease of five points between 2005 and 2012; and Romania with an overall decrease of 2.3 points between 2005 and 2012. GEI increases and decreases have been uneven among Member States: some of them – Cyprus, Germany, Ireland, and Italy – have experienced increases higher than five points; some others – such as Slovakia and the United Kingdom – have seen a decrease of four points or more.

Estonia	45.3	49.7	49.8
Ireland	50.8	55.1	56.5
Greece	38.2	39.8	38.3
Spain	48.7	53.7	53.6
France	52.5	55.9	55.7
Croatia	41.6	40.1	39.8
Italy	34.6	39.6	41.1
Cyprus	38.5	42.6	44.9
Latvia	44.0	45.3	46.9
Lithuania	43.6	42.2	40.2
Luxembourg	53.7	50.1	55.2
Hungary	37.2	42.0	41.6
Malta	43.4	42.4	46.8
Netherlands	63.6	69.1	68.5
Austria	50.5	49.1	50.2
Poland	42.7	43.0	43.7
Portugal	37.4	40.1	37.9
Romania	36.0	35.0	33.7
Slovenia	52.7	54.9	57.3
Slovakia	41.5	39.8	36.5
Finland	70.0	71.4	72.7
Sweden	72.8	74.4	74.2
United Kingdom	62.0	58.9	58.0
EU-28	51.3	52.4	52.9

Source: EIGE (2015), Gender Equality Index 2015.

The GEI in the sub-domain of work

The **Sub-index Work measures the extent to which women and men can benefit from equal access to employment and appropriate working conditions** in order to eliminate all forms of segregation and discrimination and guarantee equal access to economic resources. The Sub-index Work is measured considering three main aspects: participation, segregation, and quality of work.[37] Participation aims at capturing the differences between

[37] The contribution of each indicator is normalised and, therefore, low values for one of the indicator do not call into question the overall indicator or the meaning of the other indicators in the index. For instance, if a country

women and men in their working time and involvement over the life course. Segregation means the unequal representation of women and men across sectors and occupations. Eventually, quality of work represents a multifaceted concept including several different dimensions – pay, fringe benefits, job security, autonomy and control, working time, work–life balance, job satisfaction, job content, intrinsic job reward, promotion, training, skills development, health and safety, gender equity, work intensity, and representation – which can be summarised into four main categories: career and employment security; health and well-being; skills and competences; and work–life balance.

As for the total GEI, **the Sub-index Work produces a score that ranges between 1 and 100** where 100 represents the best situation in terms of levels of achievements and full gender equality in the domain of work for each Member State. In this case as well, the EU-28 score has to be interpreted as the measure, concerning the domain of work, of gender gaps in relation to the level of social cohesion existing across Member States.

As in the case of the total GEI also for the Sub-index Work, **available data refer** to the 2005–2012 period, using **2005, 2010, and 2012** as reference years.

The **EU-28 average score** of the Sub-index Work **slightly increased** in the period 2005–2012 (0.8 points) and **the gap between the top and the lowest score has increased over time**. Sweden has been constantly at the top of the ranking, improving its scores from one data collection to the other. In 2005 Sweden scored the highest value (73.6) while the lowest score was registered in Malta (48.3); in 2010 Sweden scored 80.6 while the lowest score was registered in Slovakia (53.2); in 2012 Sweden scored 81.0 and the lowest score was registered in Slovakia again where the value was further decreasing (52.8).

One of the most significant results that can be observed through data analysis is that **during the reporting period** the **differences** for the Sub-index Work **among EU-28 Member States have significantly increased**.

As a matter of fact, the increase in the top score of the Sub-index Work (73.6 in 2005 and 81.0 in 2012, that is 7.4 points) is higher than the increase in the lowest score (48.3 in 2005 and 52.8 in 2012, that is 4.5 points).

Three Member States (Italy, Greece, and Czech Republic) **experienced a drop** in the Sub-index Work of more than five points between 2005 and 2012, meaning that gender equality as for the labour market has significantly decreased in the above-mentioned Member States.

Other **nine Member States** have experienced a **significant score increase** (five points or more), showing an improvement in gender equality in the labour market. These Member States are: Cyprus, Finland, Hungary, Ireland, Luxembourg, Latvia, Malta, Sweden, and the United Kingdom.

Values concerning the Sub-index Work show an **interesting correlation with the financial and economic crisis** since **Member States most affected by the crisis** have experienced a **decrease or a negligible increase in the score** over the years. This is the case of Italy and Greece, whose overall trends were negative in the period 2005–2012. Spain is an

presents a low employment rate and a high level of segregation, it will have a low level of the Sub-index Work, and this will be still significant. See the methodological details in EIGE (2015).

exception as the Sub-index Work significantly increased between 2005 and 2012 and then slightly decreased between 2010 and 2012. The analysis of trends shows a more composite picture[38].

Table 2: GEI Sub-index Work for 2005, 2010, and 2012

Country	GEI Sub-index Work		
	2005	2010	2012
Belgium	59.2	60.2	59.5
Bulgaria	57.6	58.3	58.7
Czech Rep.	61.0	54.5	54.2
Denmark	72.1	78.1	76.8
Germany	60.2	62.3	62.2
Estonia	59.5	61.8	62.0
Ireland	56.4	66.5	65.8
Greece	66.8	58.7	56.9
Spain	54.8	60.2	59.6
France	61.2	61.7	61.3
Croatia	52.0	54.2	53.6
Italy	59.0	53.3	53.8
Cyprus	66.1	77.6	74.0
Latvia	55.3	61.7	63.3
Lithuania	59.1	55.8	55.6
Luxembourg	55.1	62.8	63.6
Hungary	53.1	60.7	60.7
Malta	48.3	58.1	60.7
Netherlands	64.2	69.5	69.0
Austria	67.5	67.0	66.5

[38] In 11 Member States (Belgium, Denmark, Germany, Ireland, Spain, France, Croatia, Cyprus, Netherlands, Finland, and United Kingdom). In all of them, however, a net increase between 2005 and 2012 was recorded, and this increase was especially remarkable in Ireland (9.4 points), Cyprus (7.9 points), the United Kingdom (5.8 points), Finland (5.3 points), Spain and the Netherlands (4.8 points), and Denmark (4.7 points). Further seven Member States (Bulgaria, Estonia, Latvia, Luxembourg, Hungary, Malta, and Sweden), experienced a continuous advancement for this indicator. The total increase was high in Malta (12.4 points), Latvia (8.0 points), Luxembourg (8.5 points), Hungary (7.6 points), and Sweden (7.4 points). At the same time, nine Member States recorded a continuous decrease (Czech Republic, Greece, Austria, Lithuania, Poland, Portugal, Romania, Slovenia, and Slovakia) – the highest decreases were recorded in Greece (9.9 points) and the Czech Republic (5.8 points). In one Member State only (Italy), an initial decrease was followed by an increase, but the recovery was very small compared to the previous loss (the indicator stood at 59.0 in 2005 and reached only 53.8 in 2012).

Poland	58.5	55.8	55.5
Portugal	61.0	60.2	59.1
Romania	65.3	61.9	61.6
Slovenia	65.9	65.3	63.6
Slovakia	54.7	53.2	52.8
Finland	67.3	73.0	72.6
Sweden	73.6	80.6	81.0
United Kingdom	63.7	70.0	69.5
EU-28	61.1	62.2	61.9

Source: EIGE (2015), Gender Equality Index 2015.

1.2. Labour market gender trends in seven selected Member States

The overall situation of female employment in the crisis period (reporting period 2008–2013/2014) in **seven selected Member States – Spain, Romania, Poland, Greece, Finland, Ireland, and Germany** – shows a highly differentiated situation, which deserves a specific state-by-state analysis.

1.2.1. Germany

As for **Germany**, the economic and financial **crisis does not seem to have caused a serious impact on employment and unemployment** rates[39]. This trend has characterised **both men's and women's** employment. In particular, in 2013, women's employment rate was 72.3% (men's rate was 81.9%); female employment rate increased from 67.8% in 2008 to 72.3% in 2013 (men's rate increased from 80.1% to 81.5%); in 2014, the employment rate for women (20–64) was 73.1%, 0.6 p.p. higher than in 2013, but still below men's employment rate (82.3% in 2014, up 0.2 p.p. from 2013). Women's unemployment rate decreased from 7.7% in 2008 to 5.0% in 2013 (men's rate decreased from 7.4% to 5.6%); in 2014, the unemployment rate (15–74) was 4.6% for women and 5.3% for men. Both rates saw a slight decrease compared to 2013 when it was 4.9% for women and 5.5% for men. **From a qualitative point of view, women work part time much more often than men do**: in 2013, the part-time rate for women was 47.3% compared to 10.6% among men; the share of part-time workers among women in 2014 was 47% (down 0.3 p.p. from 2013), compared to 10.8% among men (up 0.2 p.p. from 2013). This fact is due to the **low level of childcare services, especially for children younger than three years**: in 2013, formal childcare for children under three years had a total coverage of 28% of all children compared to a coverage of 13.6% in 2006.

As for the sectoral composition of female work, the increase in women's employment between 2008 and 2013 is mainly due to the increase of female employees in the following sectors:

[39] On the whole, the overall number of employees has increased between 2008 and 2013 by nearly one million (from 38,541,500 in 2008 to 39,531,400 in 2013); the total employment rate consequently increased from 74% in 2008 to 77.1% in 2013; moreover, the unemployment rate decreased from 7.5% in 2008 to 5.3% in 2013.

electricity, gas, steam and air conditioning supply, wholesale and retail trade; repair of motor vehicles and motorcycles; and education and professional, scientific, and technical activities. In traditionally male-dominated sectors – such as mining and quarrying or construction – the share of female employees is very low, while some sectors – such as education, human health, and social work activities – still are strongly feminised (female employment being respectively at 70% and 77%). These figures show that **gender segregation by sector is still far from being overcome in the country**.

As for the **GEI, in 2012** Germany scored 55.3, ranking 10 among EU Member States. This score is significantly **higher than those registered** in **2005** (49.7) and **2010** (49.9), highlighting a reduction in gender gaps. As for the **Sub-index Work**, it is even **higher than the general GEI**, scoring 62.2 in 2012; the participation score was very high as well with a 75.9 score in 2012. Nonetheless, the **segregation** score was much lower (51.0 in 2012), reflecting the **high level of labour market segregation** and the higher part-time work rate among women rather than among men.

1.2.2. Greece

As for **Greece,** between 2008 and 2013, the **employment rate dramatically decreased** by 26.7%; **unemployment increased** by 15 points both for women and men. In **2014** the male employment rate for the age group 20–64 (62.6% in 2014) remained almost at the level of 2013 (62.7%) while **unemployment rates showed a (timid) decline** since the onset of the crisis (the female unemployment rate for the age group 15–74 decreased from 31.4% in 2013 to 30.2% in 2014, and the respective male rate moved from 24.5% to 23.7%). This trend caused a differentiated impact as **men tended to move out of the labour market** while **women intensified** their efforts to obtain a **job**. It should be noted that women are not supported in their efforts to participate in employment by formal childcare services. The **coverage rate of children by formal childcare** services in Greece is **low** when compared to the EU-28 average. In 2013, only 14% of children under 3 years of age and 69% of children aged 3-6 years attended formal childcare services (against 27% and 82%, respectively, in the EU-28 on average). The rate had increased only marginally from 2011 to 2012 for both 0-3 year-olds and 3-6 year-olds but decreased quite strongly in 2013.

Female participation in **female-dominated economic sectors remained substantially stable** in the reporting period: activities of households as employers (-1%); professional, scientific, and technological activities (-0.6%); human health and social work activities (-0.4%); and other services (-1.7%). In education and financial and insurance activities, female participation significantly increased, respectively by 1.7% and 4.2%. On the whole, **women in 2014 represented a greater part of total employees**, **increasing their share both in sectors where they were underrepresented** (manufacturing, construction, water supply, transportation, and storage) **and in female-dominated sectors** (such as education and financial and insurance activities).

In gender equality terms, what the experts report is that, during recession and crisis period, the gender gap declined but the increasing trend of gender equality arrested if not reversed. As for the **GEI, its score improved slightly between 2005 and 2010 and worsened afterwards** due to the severe decrease in achievements, even though there have been significant improvements in the reduction of gender gaps. The **Sub-index Work score recorded a significant decrease**, by far the deepest among EU-28 countries[40].

[40] Greece does not feature the lowest score but the largest decrease over time regarding the Sub-index Work.

1.2.3. Spain

As for **Spain, the financial and economic crisis originated from the construction sector** due to the enormous ‘real estate bubble’ consequent to economic policy measures implemented in the years preceding the crisis outburst. In fact, between 2008 and 2010, 46% of the job layoffs concerned the construction sector; 33% were registered in the manufacturing sector, and 16% in wholesale and retail trade: all of these economic sectors are considered to be male-dominated. For this reason, 79% of total job losses were absorbed by men between 2008 and 2010. **Afterwards,** as the financial crisis continued to propagate between 2011 and 2013, **other economic sectors were compromised** as were female jobs, which absorbed 34% of the layoffs. As for traditionally **female-dominated activities** – i.e. education and human health and social work activities – these experienced an employment rate growth between 2008 and 2010 (4% and 8.6%, respectively) but **endured the impact of the crisis** between **2011 and 2014** (-4.5% and -3.1%, respectively).

As for labour **gender segregation**, it **diminished between 2007 and 2010 as a consequence of employment evolution** in the sectors of construction, public services, social services, and other services, which represent the explanatory factor of 68% of total segregation.

Formal **childcare total coverage** is at acceptable levels if compared to Barcelona Targets but it has slightly decreased for children up to the compulsory school age: by 4 p.p. for children aged 0-2, reaching 35%, between 2011 and 2013; by 2 p.p. among children aged 3-6 between 2012 and 2013. Furthermore, for children between 6 and 12 years old, there is a decreasing trend from 100% in 2011 to 97% in 2012.

The **total GEI improved** between 2005 and 2010 (from 48.7 to 53.7) and slightly declined afterwards (53.6). Eventually, considering the **Sub-index Work**, it can be reported that it **improved** substantially between 2005 and 2010 (5.9 points) and further increased until 2012, although only by one point (reaching a 51.1 score). The segregation sub-index of the Sub-index Work experienced a relevant evolution from 20.5% in 2005 to 22.6% in 2010, reaching 23.6% in 2012. This seems to be related more to the impact of the crisis on **male-**dominated sectors.

1.2.4. Ireland

As for **Ireland**, data reveal that the **impact of the economic and financial crisis** on the unemployment rate has **had a gender dimension**: **male-dominated economic sectors** – such as agriculture, manufacturing, and construction activities – **have suffered the most** from the increasing unemployment rate, whereas female-dominated sectors – such as the public sector and health and education activities – have been sheltered from the recession at least in terms of layoffs (the female unemployment increased by 94% between 2008 and 2014). For this reason, the **gender gap between employment rates for men and women has narrowed** but with an **overall levelling down** due to the dramatic increase in male unemployment (127% increase between 2008 and 2014) rather than to the improvement in female employment rate. The differentiated impact of the crisis by sectors, **mirrored in a reduction of the overall gender segregation rate** by sector. Feminisation rates of single sectors over the considered period present a relevant decrease in the real estate activities (the feminisation rate was 55% in 2008, 48.2% in 2013, and 38.8% in 2014).

Irish female workers are not provided with the **necessary childcare facilities** as Ireland has been estimated to spend less than half the OECD[41] average on early childhood care and education; affordable childcare services are very difficult to access and, since Ireland has amongst the highest childcare costs in all OECD countries, this contributes to creating a relevant disincentive to work, especially for single parents. Consequently, **family-based care is the most common form of childcare** with less than 20% of children aged two in formal childcare settings in 2014. For low-income families, childcare can cost up to 40% of the total income; families with two children pay on average 24% of their income, which is double than the EU average cost. The Irish Government has implemented some measures in order to guarantee access to childcare services: the dominant form of support is the universal child benefit payment, which has been cut though from EUR 160 per minor to EUR 130 per minor over 2009–2013 and then increased up to EUR 140 in 2014–2015. A second contribution consists of a EUR 1,000 cash payment for 0–5 year-old children to accommodate parental care choices: this contribution as well was cut in 2009, abolished in 2010, and replaced with a free pre-school year. Nonetheless, an Early Childhood Care and Education (ECCE) scheme was introduced and in 2015 extended to a second year. The Government has announced that a new single affordable childcare programme would be introduced in 2017, reinforcing other existing affordable childcare schemes destined to low income mothers or community-based programmes.

As for the **GEI**, the trend has shown a **steady upward trajectory** between 2005 and 2012; the **sub-domain of work** in particular reported a **10-point improvement** between 2005 and 2010, enduring afterwards a slight decrease due to the general impact of the crisis on employment.

1.2.5. Finland

As for Finland, the labour market composition shows a **high degree of gender segregation by occupation and sector**: 48% of female employees work in the public sector where men represent only 21% of the employees. **Female employment has suffered from the economic crisis much less** than male employment: the number of employed women decreased by 23,000 units between 2008 and 2014, whereas the number of employed men decreased by 61,000 units in the same period. Since the male employment rate decreased by 3.1 points (from 72.3% in 2008 to 69.2% in 2014), but the female employment rate only by 1.1 points (from 68.9% in 2008 to 67.9% in 2014), the narrow gender employment gap has further diminished. **Most of the lost jobs were in the male-dominated sector of manufacturing** (-85,800 units) and, at the same time, the **employment rate clearly increased in the female-dominated sectors** of education (11,900 more jobs) and in human health and social work activities (15,300 more jobs). For this reason, nearly half of the employed population is represented by women, whose labour participation increased between 2008 and 2014 by 7.7 points, reaching 48.8%, due to the relevant layoffs in male-dominated sectors. Interestingly, the number of **men employed in human health and social work activities increased** much more than the number of women from 2008 to 2014. At the same time, the share of women employed increased in the following sectors: construction (0.7 points, 7.9%); wholesale and retail trade (+0.2 points, 50.4%); real estate activities (5.5 points, 48.1%); education (0.9 points, 67.8%); arts, entertainment, and recreation (1.4 points, 52.6%); other service activities (1.3 points, 70.5%); and activities of households as employers (14.1 points, 63.5%). **Women's participation in male-dominated sectors** by contrast **slightly decreased**, and so did it in some female-dominated sectors such as social work activities (from 89.35% in 2008 to 86.7% in 2014), accommodation and food service activities (from 74% in 2008 to 69% in 2013), and financial

[41] Organisation for Economic Co-operation and Development.

and insurance activities (from 66.2% in 2008 to 60.8% in 2014). Finnish mothers still are the main beneficiaries of family leaves and the subjects in charge of household chores. Men are getting more active though.

According to national sources, **63% of children aged 1 to 6 years** were in formal day care in **2013**. In 2008, 35% of **female employees** as against **27%** in 2013 reported that **they do much more home chores than their husband**; 23% of male employees in 2008, as against 19% in 2013, reported that their wife does much more home chores than themselves.

As for the **GEI,** Finland scored the **second highest** in the total GEI in 2005, 2010, and 2012, and the value constantly increased. In the **sub-domain of work**, Finland **scores the fourth-best result**; the value considerably increased from 2005 to 2010 and then slightly decreased, being still much higher (by 5.3 points) in 2012 than 2005. This is mainly due to the remarkably progress in the sub-components of segregation and quality of work.

1.2.6. Poland

As for Poland, in terms of the impact of the crisis on the labour market, **employment rates i**ncreased both for women (52.2% in 2005 and 53.2% in 2012) and men (66.1% in 2005 and 66.4% in 2012). **Unemployment rates increased** as well **both for women** (2.9%) **and for men** (2.7%): this led to an increase in the gender unemployment gap, which reached 1.6% (9.4% for men and 11% for women). The financial and economic crisis has affected job quality as well since the **number of temporary and part-time contracts increased both for men and for women** between 2008 and 2013. Moreover, the Polish anti-crisis measures package has produced an increase in measures favourable for employers without implementing measures targeted at easing the effects of the crisis on employees.

In Poland, the **economic sectors with the highest feminisation rates** are: **activities of households as employers** (94%); human health and social work activities (81%); and education (78%). In the reporting period, the feminisation rate remained quite stable except for the service activities sector, whose feminisation rate increased by 4% (from 60.8% in 2005 to 64.7% in 2012), and in the real estate sector, whose feminisation rate decreased by 6% (from 59% in 2005 to 53% in 2012). Regarding **childcare**: the total **coverage of formal childcare services for children under three years of age was 5% in 2013**; the total coverage rate for children between three years to compulsory school age stood at 38% in 2013; for children from compulsory school age up to 12 years, the total coverage was 95% in 2013.

As for the **GEI, Poland's score** increased by one point in the reporting period (from 43.7 in 2005 to 42.7 in 2012): the overall score is far **below the EU average**, though. The score of the **Sub-index Work decreased** by three points (from 58.5 in 2005 to 55.5 in 2012): more specifically, the sub-component of participation increased by 3.3 points (from 67.8 in 2005 to 71.1 in 2012); the sub-components of segregation and quality of work decreased dramatically by 7.2 points. These data suggest that, while female participation in employment increased in the reporting period, the quality of women's jobs worsened and job market segregation deepened.

1.2.7. Romania

As for **Romania**, the **overall female employment rate decreased** by 453,500 units (10.8%) in the reporting period. This trend affected all economic sectors but has been particularly **relevant** for: **mining and quarrying** (40%); **constructio**n (36.6%); electricity and gas (26.5%); **manufacturing** (24.5%); and education (27.1%). On the whole, male employment was less affected than the female one; the **male employment rate decreased** by 7.1%, with the most critical situation concerning the following sectors: agriculture and forestry sector (34%); electricity and gas (27.1%); mining and quarrying (24.3%); and healthcare and social services (22.1%). **Female jobs have been seriously affected particularly in male-dominated sectors**: this trend caused a serious increase in gender segregation.

Regarding childcare, 6% of children under three years were covered by formal childcare services in 2013. The **total coverage for children between three years and compulsory school age was 51% in 2013**, while the coverage of formal childcare services for children from compulsory school age up to 12 years was 88% in 2013.

As for the **GEI,** Romania has always shown a **poor performance** in gender equality: the score further decreased between 2005–2010 and 2010–2012 when the GEI score was 33.7. As for the **Sub-index Work**, the Romanian score is **closer to the EU average** even though the score dropped by 3.7 points in the reporting period (from 65.3 in 2005 to 61.6 in 2012). The **downward trend** was more relevant between 2005 and 2010 mainly due to the decrease in the gender segregation component of the Sub-index Work (-4.9 points).

2. THE EGF INTERVENTION

KEY FINDINGS

- The EGF was established as a tool to mitigate the effects of globalisation in Member States; it has then become a tool to **counteract the effects of the economic crisis** on the **EU real economy**. This goal has been reached by widening its scope and applicability.
- **The EGF regulation provides for** an **adequate antidiscrimination** rule in respect of gender and other possible grounds for discrimination; so any form of **direct gender discrimination** can be excluded.
- The EGF criteria for intervention stated in the regulation may lead to an **indirect gender bias** depending on the **interaction** with several **different factors** and are presented in the following chapters of the reports

2.1. The EGF 2007–2013 and the EGF 2014–2020: objective scope, intervention criteria, and eligible actions of the EGF intervention

The **EGF was established in 2006** with the aim of 'stimulating economic growth and creating more jobs in the European Union'. The Regulation of 2006 establishes the EGF to enable the Community to provide **support for workers made redundant** as a result of major structural changes in world trade patterns due to globalisation where these redundancies have a significant adverse impact on the regional or local economy'[42]. The specific **goal** of the EGF was meant to be the facilitation of the 're-integration into employment of workers affected by trade-related redundancies'[43].

The **specific goal of the EGF** was initially[44] related to the following three criteria of applicability of the EGF[45]: '(a) **At least 1 000 redundancies over a period of 4 months** in an enterprise in a Member State, including workers made redundant in its suppliers or downstream producers, or (b) at least **1 000 redundancies, over a period of 9 months**, particularly in small or medium-sized enterprises, in a NACE 2 sector in one region or two contiguous regions at NUTS II level. (c) **small labour markets or in exceptional circumstances**, duly substantiated by the Member State(s) concerned, an application for a contribution from the EGF may be considered admissible even if the conditions laid down in subparagraphs (a) and (b) are not entirely met, when redundancies have a serious impact on employment and the local economy.'

The **regulation** establishing the Fund for the 2007–2013 financial framework was **modified in 2009**, to make of the EGF a tool to **counteract the effects of the economic crisis** on the real EU economy. A derogation was added in Article 1 widening the **scope** of the fund to allow for the 'support to workers made redundant as a direct result of the global financial and economic crisis'[46]. Under the condition that 'Member States applying for an EGF

[42] Art. 1, para. 1 of Regulation (EC) No 1927/2006.
[43] Art. 1, para. 2 of Regulation (EC) No 1927/2006.
[44] Art. 1, para. 1 of Regulation (EC) No 1927/2006.
[45] Art. 2 of Regulation (EC) No 1927/2006.
[46] Art. 1 of Regulation (EC) No 546/2009.

contribution under this derogation shall establish a direct and demonstrable link between the redundancies and the financial and economic crisis'[47].

At the same time, again to **widen the applicability** of the EGF, the intervention criteria were also modified by **halving the minimum number of redundancies** (500 by then) required under the given conditions[48], and more clear indications for the calculation of redundancies were given. Additionally, an eligibility criteria was added clarifying that 'also workers made redundant before and/or after the given period (fixed under the intervention criteria)'[49] in cases where 'an application under the latter derogates from the criteria set out in Article 2(a), provided that the redundancies occurred after the general announcement of the projected redundancies and a clear causal link can be established with the event which triggered the redundancies during the reference period'.

With the **2014–2020** financial framework, the **overall aim of the EGF has not changed** although its specific goal has been modified. With the new programming period, also **self-employed workers have been allowed to benefit from the fund**. The goal of the EGF since 2014 has been to 'support workers made redundant and self-employed persons whose activity has ceased as a result of major structural changes in world trade patterns due to globalisation, as a result of a continuation of the global financial and economic crisis addressed in Regulation (EC) No 546/2009, or as a result of a new global financial and economic crisis'[50], in order to allow them to participate in actions that can contribute to their sustainable employment. To better specify the profile of potential beneficiaries, the 2014–2020 regulation has also included a clear-cut definition in its Article 3: '(a) a worker whose employment is ended prematurely by redundancy, or ends during the reference period referred to in article 4 and is not renewed; (b) a self-employed person who employed not more than 10 workers made redundant within the scope of this Regulation, and whose activity has ceased, provided that the activity was demonstrably dependent on the enterprise concerned' as supplier or downstream producer.'[51]

The **intervention criteria** for the 2014–2020 financial framework have been **modified accordingly** allowing for a financial contribution from the EGF in two cases.

- First case: '(a) at least 500 workers being made redundant or self-employed persons' activity ceasing, over a reference period of four months, in an enterprise in a Member State, including workers made redundant and self-employed persons' activity ceasing in its suppliers or downstream producers; (b) at least 500 workers being made redundant or self-employed **persons**' activity ceasing, over a reference period of nine months, particularly in Small and Medium sized Enterprises (SMEs), all operating in the same economic sector[52] and located in one region or two contiguous regions[53] provided that there are more than 500 workers or self-employed persons affected in two of the regions combined'.
- Second case: 'In small labour markets or in exceptional circumstances, in particular with regard to collective applications involving SMEs, where duly substantiated by the applicant Member State, an application for a financial contribution under this Article may be considered admissible even if the criteria laid down in points (a) or (b) of the First case are not entirely met, when the redundancies have a serious impact on employment and the local, regional or national economy'.

47 Art. 1 of Regulation (EC) No 546/2009.
48 Five hundred redundancies under criteria a) and b).
49 Provided for in Arts. 2, paragraph a, or 2, paragraph c.
50 Art. 1 of Regulation (EU) No 1309/2013.
51 Arts. 3 and 4 of Regulation (EU) No 1309/2013.
52 Defined at NACE Rev. 2 division level.
53 Defined at NUTS 2 level, or in more than two contiguous regions defined at NUTS 2 level.

As regards the **eligible actions**, they had not changed during the whole application period for the 2006–2013 financial framework, and the 2006 act establishing the EGF allowed only for Active Labour Market Policies (ALMP) forming a part of a **package of personalised services designed to reintegrate redundant workers into the labour market**, including: non-economic measures focused on tailor-made training/retraining, job search assistance, entrepreneurship promotion or aid for self-employment; time-limited allowances supporting ALMP; other types of **measures to stimulate disadvantaged or older workers in remaining in or returning to the labour market**[54].

In the current programming period (2014–2020 financial framework), eligible actions[55] have been widened up:

- in the case of ALMP, **more aid for self-employment** and business start-ups, as well as employee take-overs and cooperation activities is envisaged;
- in the case of economic incentives and allowances, also **recruitment incentives** for employers and **subsistence** allowances are additionally envisaged as well as specific allowances for carers;
- in the case of measures aimed at particular disadvantaged groups, the young unemployed (especially **NEETs**) have become beneficiaries of **specific initiatives** (Youth Employment Initiative, **YEI**).

However, it is underlined that: the **costs of economic measures** 'may **not exceed 35%** of the total costs for the coordinated package of personalised services'[56]; the cost of investments for self-employment, business start-ups, and employee take-overs may not exceed EUR 15,000[57]; the design of the coordinated package of personalised services should anticipate future labour market perspectives and required skills, and the coordinated package should be compatible with the shift towards a resource-efficient and sustainable economy[58].

2.2. The EGF 2007–2013 and the EGF 2014–2020: selection criteria and gender segregation

The **criteria** established by the EGF regulations that have been discussed in depth in the previous section may, in principle, lead to some **indirect gender bias**.

The bias does not directly depend on the gender of potential beneficiaries; in that case, direct discrimination would be tackled but this is not possible as the EGF regulation provides for an adequate antidiscrimination rule in respect of gender and other relevant grounds (see Article 7 of the regulation for the EGF 2007–2013[59] and Article 10 of the regulation for the EGF 2014–2020[60]). This potential gender bias is therefore indirect**. Is there any other implicit mechanism in the regulation that may favour it**? More in general, what are the factors that favour it and how this potential indirect gender bias turns into an actual indirect gender bias in every Member State?
As a general remark, however, **large firms** are more likely to **characterise sectors** that are typically **male-dominated** (as shown in Chapter 1).

[54] Art. 3 of Regulation (EC) No 1927/2006.
[55] Art. 7 of Regulation (EC) No 1927/2006.
[56] Art. 7 of Regulation (EC) No 1927/2006.
[57] Art. 7 of Regulation (EC) No 1927/2006.
[58] Art. 7 of Regulation (EC) No 1927/2006.
[59] Regulation (EC) No 1927/2006.
[60] Regulation (EU) No 1309/2013.

For the previous programming period (2007–2013) and more so for the first regulation that was in force before 2009, the EGF was applicable especially to large firms facing a very important shock due to globalisation; the criterion of small labour markets and the criterion of the exceptional circumstances could limit to some extent the potential gender bias.

However, these two criteria have been applied in very few cases (11) compared to 152, i.e. the total number of cases of application[61]. The criterion of small labour markets was applied in only two cases: Perlos EGF/2007/004 and Wearing apparel EGF/2007/008 (equal to 1.3% of cases, both under the first regulation of the previous programming period) and the criterion of the exceptional circumstances was applied in only nine cases: AB Snaige EGF/2009/010, Limburg EGF/2009/028, Drenthe EGF/2009/030, Linak EGF/2009/031, AT&S EGF/2010/008, N Brabant EGF/2010/027, Overijssel EGF/2010/028, Austria Tabak EGF/2011/010, and Flextronic EGF/2011/013, all under the second regulation of the previous programming period (which corresponds to 5.9% of the total number of cases of application). The criterion under 'a' was applied 62 times (40.8% of cases of application)[62] while the criterion under 'b' was applied in 59 cases (38.8% of cases of application)[63]. The criterion under 'c' (available for the present programming period only) was applied four times (2.6% of cases of application).

The modified criteria, **introduced in 2009,** were an improvement as the number of required **redundancies** was **halved**. Even more so, the new criteria for **the 2014–2020** programming period allowing even **self-employed** to be computed for requiring an intervention.

These improvements, however, **have not completely removed the risk of a potential indirect gender bias**.

The issue has been investigated by desk analysis and consultations with informants. Consultations were conducted with EU-level stakeholders, the EGF Managing Authority at the European Commission, national Managing Authorities in seven selected Member States (Germany, Greece, Spain, Ireland, Poland and Romania)[64]. The results are presented in the following chapters.

[61] For 15 cases the intervention criterion is not specified in the public list available on the European Commission's website.

[62] Seven cases under the first version of the 2006–2013 regulation criteria (1,000 redundancies).

[63] Fifteen cases under the first version of the 2006–2013 regulation criteria (1,000 redundancies).

[64] Gender equality experts have been involved in the analysis at Member State level to provide their valuable expertise in the field, they are: Alexandra Scheele in Germany, Antigone Lyberaki in Greece, Elvira Gonzales Gago in Spain, Hanna Sutela in Finland, Mary Murphy in Ireland, Agatha Agowska in Poland, Livia Popescu in Romania.

3. IMPLEMENTATION OF THE EGF IN A GENDER PERSPECTIVE

KEY FINDINGS

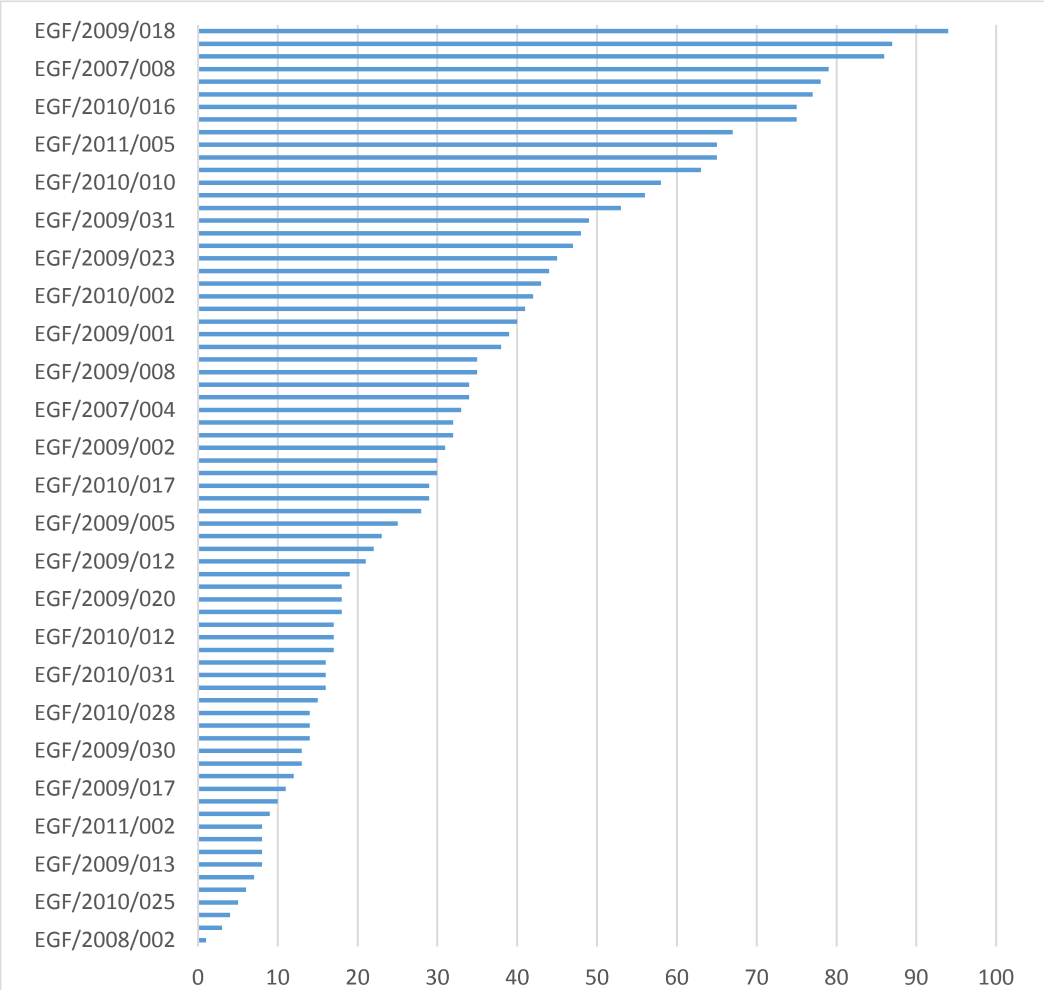
- According to **provisional data** provided by the **European Commission**, female beneficiaries of EGF interventions amount to **33%** (2007–2013 period). These data can be explained considering that **male-dominated sectors** are those **mostly affected** by the economic crisis; the assessment conducted by the European Commission also shows that 'the proportion of female beneficiaries has a positive relationship with re-employment rates'.
- **EGF funds** have been **awarded** mainly to **male-dominated sectors** in all the seven selected EU Member States with the partial exception of Greece.
- The **gender impact of EGF** interventions in **seven selected Member States** (Germany, Greece, Finland, Poland, Romania, Ireland, and Spain) has been investigated in **two steps**: first, comparison of two cases (one from a female-dominated sector and one from a male-dominated sector); second, an in-depth analysis of significant cases.
- For the **comparison of the two cases**, it has been often **hard** to identify **examples** of **EGF interventions** concerning a **female-dominated sector**. As for the **measures implemented** through EGF interventions, in most cases they **are the same** both in male-dominated sectors and in female-dominated ones, and mainly concern vocational training and career counselling. **Some** interventions in **female-dominated** sectors included **gender-relevant measures** not always to women's advantage (see the Greek case). Implemented **measures often** tended to **reinforce gender stereotypes**, encouraging women to re-enter the labour market in typically female-dominated sectors (see the two cases considered for Spain) as the **choices** are driven by **job availability**; however, the **German** and the **Finnish cases** were examples for commitment to **gender desegregation**.
- For the in-depth analysis of significant cases, **common trends** have been highlighted: the proportions of **women** among the **actual** beneficiaries are **higher** than among **targeted** beneficiaries since women tend to participate more than men in measures. In the cases in which specific **measures for carers** were provided, a specific budget was set and **women benefitted the most** from them. Besides, no significant difference in the expenditure by gender has been reported at Member State level. As regards measures, **gender specific measures** were **adopted** in the two cases selected in **Spain** and in **Ireland**, and in the one chosen in **Romania**.
- The **Perlos** and **BenQ** cases have received special attention by the monitoring authorities. In **Finland,** results from evaluations have been **used to develop** a **model of implementation** to be applied in other cases. In **Germany**, **more attention** is nowadays devoted to **gender equality**.
- Considering the interventions that funded the **YEI**, launched by the European Commission in 2013 in order to reduce youth unemployment and increase the youth employment rate, **no gender-relevant measures tailored only on NEET beneficiaries have been reported**.

3.1. Gender segregation and beneficiaries of the EGF in implemented interventions

3.1.1. Aggregated level

According to the data made available by the European Commission in the final *ex-post* evaluation for 2007–2013[65], the average share of **female final beneficiaries** of the EGF is **33%**. The average was calculated on 73 cases. These were the cases for which information by gender was made available by the Managing Authorities in Member States.

Figure 5: Share of female EGF beneficiaries across the assessed cases



Source: European Commission (2015).

The European Commission is still receiving evaluations for the previous EGF programming period. At the time of the last contact[66] with the European Commission, all cases up to EGF/2013/006 had been evaluated.

The low proportion of women among beneficiaries is **explained** by the prevailing **sectors of application** of the EGF, which, according to the European Commission, are in the large majority **male-dominated sectors**[67]. The complete list of interventions provided by the European Commission shows that the cases of application in the automotive sector are

[65] European Commission (2015), *Ex-post evaluation of the European Globalisation Adjustment Fund (EGF)*, available at: http://ec.europa.eu/social/BlobServlet?docId=14371&langId=en.

[66] 17 March 2016.

[67] Consultations with the EGF Managing Authority at the European Commission were conducted on 10 March 2016 and 14 March 2016.

around 16% (on a total of 152), and in the construction sector, they represent 8% of the total number. The sectors of basic metals, machinery, and equipment together account for 15.1%. This would be in turn related to the fact that the crisis and the decline has strongly impacted on male-dominated sectors across EU-28 Member States. However, with the later retrenchments in public spending related to the crisis, even the public administration and welfare services that are among the most feminised sectors by tradition have undergone restructuration, and this has impacted on women's employment as well, but more on quality of jobs rather than on quantity. In any case, the application of the EGF in these sectors has been negligible.

As regards the relation between gender and successful reintegration **into** the labour market of EGF final beneficiaries, the assessment conducted by the European Commission[68] shows that '**the proportion of female beneficiaries has a positive relationship with re-employment rates'**.

3.1.2. Gender segregation and beneficiaries of the EGF in seven selected Member States

In the **seven selected Member States**, the analysis of the overall beneficiaries of the EGF at aggregated level and of its impact on gender segregation in the reporting period (2008–2013) shows that **EGF funds** have been **awarded mainly to male-dominated economic sectors** in all the considered Member States, with a partial exception for Greece: this is due both to the fact that male-dominated sectors are those most affected by the economic and financial crisis in most of the selected Member States; and to the fact that, in some cases, female-dominated sectors are composed mainly of small firms, which do not fit EGF criteria. For these reasons, EGF interventions have had a scarce impact on female employment and on gender segregation.

Germany reflects the abovementioned trend, since EGF interventions concerned mainly enterprises operating in male-dominated sectors, which have been those most affected by the financial and economic crisis – such as mobile phones, mechanical engineering, automotive activities, machinery, and equipment – because of their export-oriented activities. Female-dominated sectors, such as retail trade and services, could not meet the criteria established by the EGF regulation, and did not receive financial support.

In this scenario, **Greece** can be considered a **partial exception**. The **interventions** founded by the EGF in Greece were few (just six), they **came at a later stage** and were exclusively linked to the crisis. Furthermore, they are far from being completed. The **sectors were mixed**: three interventions in retail business (where women tend to dominate employment from 76% to 90%), one in bakery products (where men are more numerous – 66% of workforce), and two other cases (broadcasting and publishing, where the gender balance is more or less achieved – 45% against 55%). So, the interventions were not oriented exclusively to *either* female *or* male-dominated sectors. They were addressed to large firms with more than 500 employees. This, in principle, is a major problem in economies dominated by small family firms, as is the case of Greece. There are only few large, labour-intensive firms, and those that exist were often established after the merger and/or take-over of previously existing firms. In view of the fact that **women make up only 30% of total *manufacturing* employees,** their **representation** in EGF interventions should be seen as **satisfactory**.

[68] European Commission (2015), *Ex-post evaluation of the European Globalisation Adjustment Fund (EGF)*, available at: http://ec.europa.eu/social/BlobServlet?docId=14371&langId=en, p. 59.

Considering the **Spanish case**, EGF funds have been concentrated in **male-dominated sectors**: in fact, 75% of EGF financial resources have been allocated to the automotive, construction, and construction-related sectors (i.e. carpentry and joinery, building materials, metalworking industry, and stone/marble production) whose male employment share exceeds in all cases 80%. The remaining 25% of the allocated funds have concerned gender-balanced activities, such as textile (37.8% female employment share), footwear manufacture (42.4%), retail (50.1%), and food and beverage (50.6%). Sixty-eight per cent of the beneficiaries of EGF funds come from male-dominated sectors, whereas 32% are employed in more gender-balanced sectors. Female-dominated sectors – such as education (with a job loss of -3.8% in 2011–2014), human health and social work activities (with a job loss of -2.6% in 2011–2014), public administration/defence/compulsory social security (with a job loss of -11.8% in 2011–2014), and activities of households as employers (with a job loss of -8.7% in 2011) – are surprisingly not covered by EGF funds even though they result to be the most affected sectors by the financial crisis, employment layoffs, and austerity policies. None of these sectors, with over 80% of female employees, have benefitted from EGF funds in spite of having absorbed 28.8% of female employment losses in the 2011–2014 period.

In the **Finnish** case as well, all EGF interventions have concerned **male-dominated sectors** since in Finland the male-dominated manufacturing private sector has been the most affected by job layoffs during the crisis, whereas the female-dominated sectors of education and human health and social work have experienced an employment growth during the 2008–2013 period. For this reason, Finnish experts and main stakeholders consider that EGF funds have been allocated to the right targets, and no complaints have been raised either at national or at international level. However, the real question is **whether the EGF will be applied to** the **female-dominated welfare public sector**. According to the Finnish Managing Authority, this is at present under study.

As for **Ireland,** 10 EGF interventions have been financed: **only two of them** have concerned **mixed sectors** – i.e. support service activities (TalkTalk Broadband Services Ltd) and information technology (Dell) – whereas the **remaining eight** have been destined to typically **male-dominated sectors**, such as aircraft maintenance, manufacturing, and construction. On the whole, EGF interventions reflect the sectors that have suffered the most the impact of the crisis: 61% of the beneficiaries of EGF interventions categorised as due to the crisis have been those people who had lost their jobs in the construction sector. On the whole, experts have estimated that it is reasonable that the construction sector was prioritised in EGF interventions allocation decisions, and that the degree of intervention was proportionate to the job losses at the beginning of the crisis. EGF interventions could not be addressed to more feminised sectors that experienced job losses in recession – such as retail, wholesale, food, and accommodation – because they involve small employers and consequently fall outside the scope of the EGF.

Considering the **Polish** case, **five interventions** could be funded thanks to EGF financing: these programmes have been implemented in the automotive sector (two interventions), manufacture of machinery and equipment (two interventions), and the chemical industry (one intervention). In four cases, the employees who **benefitted** from the interventions were **mainly men** (between 77% and 82% of the beneficiaries); only in one case (Wielkopolskie, automotive sector) 75.4% of the beneficiaries were female employees. This is why, according to the Polish Managing Authority, female-dominated sectors or companies could not meet EGF criteria for funds allocation.

As for **Romania**, **only two companies** have benefitted from EGF funds: Nokia (computer and electronic manufacturing) and Mechel (metal manufacturing industry). **Both** of them are in **traditionally male-dominated sectors**. According to available data, none of the female-dominated or gender-balanced sectors could meet the criteria established for EGF funding at the time when these sectors experienced the crisis.

3.2. EGF interventions in seven selected Member States: male-dominated sector cases and female-dominated sector cases

3.2.1. Aims of the analysis and applied methodology

In **every selected Member State**, **two cases of EGF application** have been chosen and **compared** in terms of **measures provided** and **resources allocated**. The two cases were selected in order to **have one case** from a **male-dominated sector** and **one case** from the **female-dominated sector**. The overall aim was to investigate whether common gender-related pattern could be identified by providing answers to the following questions:

- is there any gender difference in the type of measures provided in the two cases?
- do the resources allocated for every participant in the two cases of application differ to some extent?
- is there any gender bias in the provision of measures or in their quality?
- do the measures provided in case of female-dominated sectors take into account women's responsibility as caregivers (providing care facilities during retraining, for instance)?
- do the measures provided in both cases account for gender stereotyping in occupations, for instance by trying to introduce women or men in sectors otherwise dominated by the opposite **gender**? How?

In **some** of the selected Member States, it was **difficult** to **point out** an **example of EGF** intervention **concerning a female-dominated sector**, and a case with a high share of women among beneficiaries was selected instead. All cases provided significant information that enables us to draw some considerations concerning the amount of resources destined to female-dominated sectors thanks to EGF interventions, as well as to outline the typology of measures adopted in the EGF framework. Considering that the comparison has been conducted separately in each of the seven selected Member States, a country-specific analysis is presented. The following table presents the list of the compared cases.

All **information** has been **drawn from existing documentation** produced by the European Commission on every single case of application and from existing evaluations available, including the mid-term evaluation and the *ex-post* evaluation of the previous programming period, which in turn are based on evaluations provided by Member States on every single case. **Consultations with Managing Authorities** at **Member State level** have been conducted to clarify specific issues that emerged during desk analysis. For more recent cases (related to the 2014–2020 programming period and cases of application of the previous programming period for which information is not publicly available), consultations with the Managing Authorities in Member States have been the major source of information as regards monitoring and evaluation.

Table 3: The selected interventions for male-dominated and female-dominated sectors in the seven Member States.

Member State	Sector	Intervention	Intervention number
Germany	Female-dominated sector	Nokia	EGF/2009/002
	Male-dominated sector	BenQ	EGF/2007/003
Greece	Female-dominated sector	Odyssefs Fokas	EGF/2014/013
	Male-dominated sector	Nutriart	EGF/2014/001
Spain	Female-dominated sector	Comunidad Valenciana – Textiles	EGF/2013/008
	Male-dominated sector	Comunidad Valenciana – Metal	EGF/2014/004
Finland	Female-dominated sector	Computer Programming	EGF/2015/005
	Male-dominated sector	STX Finland Oy	EGF/2014/008
Ireland	Female-dominated sector	Talk Talk Broadband Services Ltd	EGF/2012/001
	Male-dominated sector	Construction 41	EGF/2010/019
Poland	Female-dominated sector	Wielkopolskie	EGF/2010/004
	Male-dominated sector	Fiat Auto Poland S.A.	EGF/2013/006
Romania	Female-dominated sector	Nokia	EGF/2011/014
	Male-dominated sector	Mechel	EGF/2012/010

3.2.2. Results in seven selected Member States

Germany

As for Germany, the **Nokia[69] and BenQ[70] mobile phones companies** have been considered.
The first case relates to 1,337 workers made redundant with 1,316 workers targeted for assistance; the majority of them (60.6%) were women. The second case refers to 3,300 workers made redundant, all targeted by the intervention; out of them only 37% were women.

As for the resources provided by EGF interventions (without national co-financing, so the two values refer to 50% of the actual costs), the amount provided per person was all in all the same in both of the cases considered (EUR 4,063 at BenQ and EUR 3,935 at Nokia).
At **Nokia**, **60.7% of beneficiaries were women** (in total, beneficiaries were 1,305 people). The **educational level** of supported people **influenced** their **perspectives of re-entering** the labour market. Especially employees with ISCED levels 1–3 had difficulties. Among these, the majority were women (ISCED 1 and 2 with a share of women of 90%; ISCED 3 with a share of women of 60%). Among the measures proposed for EGF promotion, one can find peer groups, which are meant to enhance the empowerment of so-called 'disadvantaged workers'. Among the four groups, women with low qualification were particularly mentioned. According to the final report by Germany, the share of women who made use of the concept of continuous reflection and support – which was part of the peer groups – was 81.2%. The gender profile of the beneficiaries at Nokia was 69% for men and 31% for women. The evaluation of the EGF shows that labour market integrations by gender differ largely from the gender structure of the employees, since **40% of men** and only **23% of women** have been **successfully reintegrated** into the labour market. At **BenQ**, beneficiaries were 2,528; the gender profile of beneficiaries was 56% for men and **44% for women**.

There are **no significant differences in the type of measures provided** between the two cases. Very similar – and high – amounts were spent on the same type of measure, and the additional non-EGF provision was substantial in both cases. No gender bias is visible on grounds of the given information. The analysis of the two cases gives reasons for the failure to find placements. It is mentioned that Nokia employees show lower willingness to travel further to reach their workplace than BenQ employees[71]. This is only related to the location of the enterprise (rural against urban environment) and not to potential care obligations. Especially at Nokia, it was mainly women who took advantage from workshops (similar was the situation at Manroland and First Solar). Similar workshops have been offered in other EGF-funded companies, such as Karmann or KMU Arnsberg.

As concerns gender stereotyping in training, according to the National Contact Point, **EGF projects in general pay attention that the opportunities for occupational redeployment and placement are not affected by gender stereotypes** (e.g. at Karman, HDM, and KMU Arnsberg). Furthermore, it is monitored that counsellors and project

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69 Information on the case available at: http://ec.europa.eu/social/main.jsp?catId=582&langId=en&egfAppsId=12&furtherEgfApps=yes.

70 Information on the case available at: http://ec.europa.eu/social/main.jsp?catId=582&langId=en&egfAppsId=13&furtherEgfApps=yes.

71 European Commission (2011), *Mid-term evaluation of the European Globalisation Adjustment Fund: final report*, p. 61.

managers who are responsible for the participants in EGF programmes are also women (e.g. HDM, KMU Arnsberg, Manroland, First Solar, and Nokia).

Greece

In the Greek case, the two considered cases of application are **Nutriart**[72] (bakery products, male dominated) and **Odyssefs Fokas**[73] (retail trade, female dominated). The Nutriart case concerns 505 workers made redundant (33.6% are women). Both the interventions are still ongoing[74].

The **resources** allocated for every participant are **the same**, with the exception of the **training allowance**; the latter is **more generous** in the male-dominated **Nutriart** case (EUR 7.5 per hour) compared to the female-dominated Odyssefs Fokas (EUR 6 per hour). No care facilities were provided while retraining. One wonders to what extent women make use of the mobility allowance (consisting of a lump sum of EUR 2,000 to move to a different location).

As far as the **measures** provided are concerned, the two interventions are **similar** with one exception: the **male-dominated Nutriart** case provides counselling services towards **entrepreneurship** and the development of an incubator, so entrepreneurship was deemed more fitting for men who lose their job. Counselling in the area of entrepreneurship is not available in the other case.

Finally, there is **no information on guidance towards employment**.
The Nutriart intervention was expected to be completed by the end of April 2016, while the case of the Odyssefs Fokas intervention is at a very preliminary stage. Although expected to be completed by September 2016, at this stage (late March 2016), two steps have been accomplished: first, the organisations selected to run the intervention (see below) and, second, the call to participate in consultations and other actions (for unemployed and NEETs). By end of May there will be more information about the number of people having applied for various actions, as well as the number (and gender) of the NEETs that responded to the call. This time horizon (end of May–beginning of June) applies equally to retraining, labour mobility, and entrepreneurship initiatives.

Spain

As for the Spanish case, the cases that have been considered are the **Comunidad Valenciana – Textiles**[75] and the **Comunidad Valenciana – Metal**[76], which represent respectively a female-dominated sector and a male-dominated one. In the former case, the number of redundancies was 560 (the share of **women was 43.4%)**; in the latter case, the number of workers made redundant was 633 (the share of women is not available).
The resources allocated to these projects have been quantitatively very similar: the expected beneficiaries of the measures are the same (300), while the share of women among targeted beneficiaries was available only for the **Metal case** (**14%**). The resources allocated differ only by 5.9% in favour of the Metal case. Nonetheless, the expected **training cost** for person was **EUR 3,370** in the female-dominated company and **EUR 1,987** in the **male-dominated**

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72 Information on the case available at: http://ec.europa.eu/social/main.jsp?catId=582&langId=en&egfAppsId=138&furtherEgfApps=yes.

73 Information on the case available at: http://ec.europa.eu/social/main.jsp?catId=582&langId=en&egfAppsId=147&furtherEgfApps=yes.

74 This information was supplied by the Greek Managing Authority for the EGF and in particular by the contact person, Dr Fevronia Striagka, to whom I am grateful.

75 Information on the case available at: http://ec.europa.eu/social/main.jsp?catId=582&langId=en&egfAppsId=128&furtherEgfApps=yes

76 Information on the case available at: http://ec.europa.eu/social/main.jsp?catId=582&langId=en&egfAppsId=141&furtherEgfApps=yes

one. This difference is only partly motivated by the fact that, in the Textiles case, **workers with dependent people** (children, elderly, or people with disability) have received **EUR 15 per day of participation** as a contribution to the expenses incurred for carers of dependent people. It is also related to the fact that participants in the Textiles case were trained to work as nurses in geriatrics, which is a highly skilled job. This aims to cover the additional costs faced by the workers with caring responsibilities in order to avail themselves of training or other measures. Though valuable, this quantity is clearly insufficient (it would hardly cover 1–2 hours of care) and cannot be considered as a support for women with family responsibilities.

Vocational training differs considerably in the two cases if considering the following mentions for the Textiles case: 'The vocational training will focus on sectors where opportunities exist or will arise, such as for **nursing assistants in geriatrics** [...] (in female-dominated sectors)'; and 'The **upskilling** will be designed to cater for the future needs of **manufacturers of fabricated metal** products, e.g.: welding techniques (such as TIG, MIG/MAG welding 18, special welding techniques, etc.); mechanical design (2D and 3D, CAD, CAD-CAM integration systems); tool and die setter; programming CNC machine tools'. Apart from gender stereotyping, **a quality difference as regards the type of jobs** that can be found by women and men after the training is perceived. However, the training cost per person is expected to be EUR 3,370 in the first case (female-dominated) and EUR 1,987 in the second case (male-dominated).

Finland

As for Finland, it was easy to point out a male-dominated beneficiary of EGF funds, i.e. the **shipbuilding company STX Finland Oy**[77] in Rauma, whose male employee share is 88%. On the other hand, it was impossible to find a female-dominated beneficiary: for this reason, a gender-balanced beneficiary has been considered, i.e. the **Computer Programming**[78] case that regards workers made redundant (45% of whom are women) **from 69 different firms** since 2015.

In both cases, measures described are pretty similar. They include career coaching, job-seeking training, and a variety of vocational training, expert assessments, and entrepreneurship promotion such as services for new entrepreneurs and start-up grants. In both cases, pay subsidies for employers employing these people are provided as well as allowances for travel, overnight, and removal costs. Some differences in the emphasis of different measures are related rather to the differences in the educational profile of the targeted groups rather than to their gender structure.
Considering the **resources allocated**, a slight difference between the two cases has been detected: the overall EGF contribution for STX Finland Oy was EUR 1,426,800 to be provided to 565 employees (on average, EUR 2,525 per person); whereas **the contribution awarded to the Computer Programming** case was **lower** as it consisted of EUR 2,623,200 apportioned among 1,200 employees (on average, EUR 2,186 per person).

No exact information is available **on the content of training** courses for these specific cases, but one of the general trends in retraining activities in unemployment services has

[77] Information on the case available at: http://ec.europa.eu/social/main.jsp?catId=582&langId=en&egfAppsId=144&furtherEgfApps=yes.
[78] Information on the case available at: http://ec.europa.eu/social/main.jsp?catId=582&langId=en&egfAppsId=160&furtherEgfApps=yes.

been to encourage men to retrain in the healthcare sector, where there have been jobs available especially for practical nurses.

Ireland

As for Ireland, national experts have pointed out two examples of EGF interventions concerning, on the one hand, the case of **Construction 41**[79] (8% of female employees) as an example of male-dominated sector and, on the other hand, the case of **TalkTalk Broadband Services Ltd**[80], which is a gender-balanced firm with 46% of female employees: a more specific example of a firm from a female-dominated sector, that could benefit from EGF interventions was impossible to find.

There is **no significant difference between the measures implemented**, in both cases being characterised by a broad range of training and educational programmes, although the TalkTalk Broadband Services Ltd programme provided for higher levels of training, as well as a contribution towards expenses associated with accessing training, such as travel, accommodation, and materials.

As for **allocated resources**, there seems to be a **large disparity** between the *per-capita* costs destined to the **Construction 41** programme (**EUR 4,217** per person) and the ones destined to the **TalkTalk Broadband Services Ltd** case (**EUR 9, 230** per person). This difference is associated with the divergent educational status of the beneficiaries: the provision of a third-level education[81] in the TalkTalk Broadband Services Ltd programme has entailed much higher costs.

Poland

As for Poland, the two considered interventions concern the Wielkopolskie[82] case and the Fiat Auto Poland S.A. company[83]. Due to a lack of interventions in a female-dominated sector, the only case in which women were the majority of beneficiaries is **Wielkopolskie**. For a male-dominated sector, the **FIAT Auto Poland S.A.** case was chosen. **Both** cases were interventions in the **automotive** industry, which added to the comparability factor of the study. Furthermore, the FIAT Auto Poland S.A. case was the larger intervention of the two, featuring a higher number and a higher degree of diversification of proposed measures.
As to resources used for implementation according to the case reports, the amount allocated for each beneficiary was EUR 1,256 for the Wielkopolskie case and EUR 1,932 for the FIAT **Auto Poland S.A.** case. This amount is calculated by taking the total cost of measures and dividing it by the real number of beneficiaries. The costs for the **Wielkopolskie** case were **higher** in the activities concerning **internships (44%) and equipment and refitting** of workplaces (22%), whereas **for the latter case, costs were higher in the activities concerning training and retraining** (39%) as well as entrepreneurship promotion and aid for self-employment (22%).

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[79] Information on the case available at:
http://ec.europa.eu/social/main.jsp?catId=582&langId=en&egfAppsId=69&furtherEgfApps=yes.

[80] Information on the case available at:
http://ec.europa.eu/social/main.jsp?catId=582&langId=en&egfAppsId=111&furtherEgfApps=yes .

[81] The TalkTalk Broadband Services Ltd firm employs mainly medium and high-skilled workers. For this reason, the activities of training and career counselling provided through the EGF intervention implied higher costs than those entailed by Construction 41, whose workers, though professionally qualified, were oriented to more practical activities rather than educational ones.

[82] Information on the case available at:
http://ec.europa.eu/social/main.jsp?catId=582&langId=en&egfAppsId=52&furtherEgfApps=yes.

[83] Information on the case available at:
http://ec.europa.eu/social/main.jsp?catId=582&langId=en&egfAppsId=127&furtherEgfApps=yes.

The provided measures are quite similar. Both projects entailed: training and retraining, training allowances, entrepreneurship promotion, and aid for self-employment, internships, and fitting and refitting of workplaces. In the Wielkopolskie case (more women beneficiaries) measures also included **help in job searching and career counselling**. The FIAT **Auto Poland S.A.** intervention provided job opportunities in which part of the salary is paid by the employment office, and part by an employer.

The **training courses** provided in **FIAT Auto Poland S.A.** (with more male beneficiaries) did not include 'typically female' specialisations, but did **include courses dealing with technical skills** such as welding. The **Wielkopolskie** intervention provided courses in **care, hairdressing, cooking, and other female-dominated professions**. Both cases seem to **reinforce gender stereotypes** rather than helping women enter male-dominated sectors and vice versa. There is no mention of any particular effort or goal for these two EGF interventions in the reports.

Romania

Considering the Romanian cases, only two interventions have been funded by the EGF, as reported in the previous section, that is Nokia[84] and Mechel[85]. **Nokia** presented 1,904 redundancies where women were 67% (1,416 workers among targeted beneficiaries, where women represented 69%); **Mechel** (metal sector), which was active in a typically male-dominated branch, featured 1,513 workers made redundant (no detailed information on redundant workers by sex is available), with 72.8% of targeted beneficiaries (1,000) being men.

The **types of measures** implemented for the **Nokia** case were the following: pre-dismissal services; registration of workers; information, counselling, and vocational guidance; mobility allowances; transport allowances; job-search allowances; training; internship allowances; financial assistance for training programme certification; entrepreneurship promotion; financial assistance for initiating independent activities; mentoring and post-hiring support; and **financial assistance for people with children**. In the Mechel case the measures provided were: registration of workers; information, vocational guidance, and counselling; vocational training courses and internships; assistance in initiating independent activities; renting the production space and paying the rent for the whole duration of the project; travel allowance; interview allowance; internship allowance; subsistence allowance; participation allowance; and mentoring after employment integration. **Measures were similar to each other, but some differences existed in the content of activities and technological support** to specific vocational orientation and retraining activities. Differences in the amounts allocated per participant correspond to the measures provided and costs in the respective industrial branch. Further information about any gender bias in the provision of measures or their quality was not available. No information is available with respect to measures aimed at introducing women in sectors otherwise dominated by men or having any impact on gender stereotyping in occupations; however, this does not seem to be a priority in the EGF implementation.

As for resources in the **Nokia** case, **EUR 3,069** per targeted beneficiary (EUR 1,841 without co-financing) was estimated, while for the **Mechel** case, **EUR 6,909** per targeted beneficiary was estimated (EUR 3,454 without co-financing). Available data on the final expenditure

84 Information on the case available at: http://ec.europa.eu/social/main.jsp?catId=582&langId=en&egfAppsId=92&furtherEgfApps=yes.

85 Information on the case available at: http://ec.europa.eu/social/main.jsp?catId=582&langId=en&egfAppsId=120&furtherEgfApps=yes.

concern only the Mechel case: in this situation, only 39% of the EGF initial budget has actually been used, and the implementation of the project lasted 22 months, consequently reducing the implementation timeframe.

3.2.3. Gender stereotypes in provided measures

The **analysis of the type of measures** implemented comparing relevant examples of interventions for female and male-dominated sectors shows an overall differentiated scenario across the seven selected Member States.

As for **Germany**, eventually, there are **no relevant differences** in the **types of measures implemented** at **Nokia** and at **BenQ**. According to the information provided, no gender bias has been detected, and EGF interventions have generally paid attention to not reproducing gender stereotypes; moreover, counsellors and project managers responsible for EGF programme participants were women[86].

As for **Greece**, the **type of measures implemented** has been reported to be **very similar between the two cases** with the **exception of entrepreneurship counselling services** and the development of an incubator, which are measures **provided only** for the **male-dominated** Nutriart. Moreover, none of the measures implemented in the Odyssefs Fokas case included tools to face the needs of female workers in charge of care responsibilities. However, the Nutriart intervention will be completed by the end of April 2016, while the case of the Odyssefs Fokas intervention is at a very preliminary stage.

In the **Spanish case**, gender stereotypes seem to be reinforced by EGF interventions since the **measures implemented** for the abovementioned companies strongly differ in relation to vocational training outcomes, reinforcing **employment gender segregation**: in the female-dominated case, employees' vocational training focused on job opportunities in the nursery and geriatrics assistance sectors, which are already female-dominated; employees' vocational training in the male-dominated case focused on the future needs of manufacturers of fabricated metal products, which is already a typically male occupation.

In the **Finnish case**, measures implemented in the **STX Finland Oy** intervention and in the **Computer Programming** intervention are **very similar**. These experiences did not include specific measures for female employees with parental responsibilities during training since in Finland children have universal access to public day care. No specific information is available on gender stereotypes; nonetheless, **retraining activities were aimed at steering men towards the healthcare sector** where many jobs were available. Sectoral **desegregation** is indeed considered as **a tool** for improving gender equality in the last gender equality strategy implemented in the country. However, this is not the only reason for the change; the desegregation process is taking place **also because this is a way to secure employment to men**.

As for **Ireland**, the **measures adopted** by EGF interventions in the Construction 41 and TalkTalk Broadband Services Ltd cases have **not shown significant differences** as, in both cases, interventions included a broad range of training and educational programmes. No specific women-tailored measures have been implemented in either of the considered cases: in fact, the **TalkTalk Broadband Services Ltd intervention**, which included a high share of female employees, **did not provide** any **equal-opportunities and non-discrimination analysis**.

[86] Consultation with the EGF National Managing Authority.

In the **Polish case** – concerning the Wielkopolskie and the Fiat Auto Poland S.A. interventions – the **measures** included are **similar**. As for the training content, **both interventions seem strongly gender-stereotypical**. None of the measures implemented in the Wielkopolskie case included tools to face the needs of female participants with care responsibilities.

As for **Romania**, the types of measures implemented in the two cases – **Nokia and Mechel – were all in all the same**, with some differences concerning the content of activities and technological support to specific vocational orientation and retraining activities. Only **in the case of Nokia**, **care facilities were provided** during the implementation of the intervention.

3.3. EGF interventions in seven selected Member States: in-depth analysis of implementation cases

3.3.1. Aims of the analysis, selected cases and applied methodology

Nine cases have been chosen in the seven selected Member States **for in-depth analysis**. The analysis provides information on targets, impacts, results, measures provided, and resources allocated.

The cases identified in the seven selected Member States for in-depth analysis are: **BenQ** (manufacture of components for telecommunication) in Germany; **Odyssefs Fokas** (retail trade) in Greece; **Galicia Metal** (manufacture of metal products) and **Valencia textile-2010** in Spain; **Perlos** (manufacture of components for telecommunication) in Finland; **SR Technics** (aircraft maintenance) and **Andersen Ireland** (jewellery) in Ireland; **Wilekopolska** (automotive) in Poland; and **Nokia** (manufacture of components for telecommunication) in Romania. They have been selected because they either are **gender-relevant** according to the results of the desk research conducted on the **existing evaluations** (Perlos, BenQ, and Galicia Metal) or have been **suggested by the Managing Authorities** (SR Technics and Andersen Ireland) as gender-relevant because they either included gender-relevant measures (Valencia textile-2010)[87] or featured a high share of women among potential beneficiaries (Wielkopolskie and Nokia).

[87] This case is also interesting as in the framework thereof training as qualified care workers was offered, which was very successful among beneficiaries (almost one fifth of the total targeted beneficiaries chose to attend it).

Table 4: The selected interventions in the seven Member States.

Member State	Intervention	Intervention number
Germany	BenQ	EGF/2007/003
Greece	Odyssefs Fokas	EGF/2014/013
Spain	Galicia Metal	EGF/2011/019
Spain	Valencia textile-2010	EGF/2010/009
Finland	Perlos	EGF/2007/004
Ireland	SR Technics	EGF/2009/021
Ireland	Andersen Ireland	EGF/2014/007
Poland	Wielkopolskie	EGF/2010/004
Romania	Nokia	EGF/2011/014

This in-depth analysis is aimed at **assessing whether** EGF policies are **perpetuating or changing** existing **inequalities between men and women** (and groups of men and women) and between **boys and girls**, as well as **patterns of gender relations** in selected cases.

The **approach adopted** can be considered as a **gender-aware policy appraisal**[88] type, following the Gender Budgeting Methodology classification laid down by Elson[89], since it involves the development of an analysis that reflects an understanding of the policy's gendered implications.

The methodology sought to answer to three research questions:

- **who** benefits from the policy intervention;
- **how much** is allocated for the policy intervention;
- **what** the potential or actual **impact** of the policy intervention is.

All **information is drawn from existing documentation** produced by the European Commission on every single case of application and from existing evaluations available, including the mid-term evaluation and the *ex-post* evaluation of the previous programming period, which in turn are based on evaluations provided by Member States on every single

[88] The techniques that might be used to develop the gender-aware policy appraisal include:
- a checklist of questions for assessing the policy, including checking the gendered assumptions of the policy against the evidence;
- a discussion of events, activities, and associated budget allocations generated by the policy; and
- checking the policy against its stated aims and performance goals.

[89] For more details see: adapted from Elson (1997b), 'Tools for gender integration into macroeconomic policy' in *Link in to Gender and Development*, 2, Summer, p. 13. See also Budlender and Sharp (1998), *How to do a gender-sensitive budget analysis: Contemporary research and practice*, Commonwealth Secretariat, available at: http://www.thecommonwealth.org/shared_asp_files/uploadedfiles/%7B1171EF87-2C5C-4624-9D76-B03CF35F4E65%7D_AusAIDTr.pdf.

case. **Consultations with Managing Authorities** at **Member State level**[90] have been conducted to clarify specific issues that arose during the desk analysis. For more recent cases (2014–2020 programming period and cases of application of the previous programming period for which information is not publicly available), consultations with the Managing Authorities have been the major source of information as regards monitoring and evaluation.

3.3.2. Targeted and actual beneficiaries of the interventions: women and men

The **targeted beneficiaries** in the selected cases in each of the seven Member States are presented in the table below. **Women are the majority** of the potential beneficiaries in the case of **Odyssefs Fokas**, **Andersen Ireland**, **Wielkopolskie**, and **Nokia**. They represent around **one third** of the targeted beneficiaries in the case of **BenQ**, **Valencia textile-2010**, and **Perlos**. They are a **minority** in the cases of **Galicia Metal** and **SR Technics**.

Table 5: Targeted beneficiaries by sex and share of women for the selected interventions in the seven Member States.

Member State	Intervention	Total	Women	Men	% women
Germany	BenQ	3,300	1,221	2,079	**37.0**
Greece	Odyssefs Fokas	600[91]	535	65	**89.2**
Spain	Galicia Metal	878	53	825	**6.0**
Spain	Valencia textile-2010	350	134	216	**38.3**
Finland	Perlos	1,361	460	901	**33.8**
Ireland	SR Technics	850	797	53	**6.2**
Ireland	Andersen Ireland	138[92]	102	36	**74%**
Poland	Wielkopolskie	590	445	145	**75.4**
Romania	Nokia	1,904	1,279	625	**67.2**

Source: EGF application procedure material and author's own calculations.

The **actual beneficiaries** in the selected cases for each of the seven Member States are presented in the following table. In the majority of the cases for which data are already available, the proportions of women among the actual beneficiaries are higher than among targeted beneficiaries. **Women tend to participate more than men in measures**. This might be related to the different opportunities and choices of women and men in the labour

[90] Consultations with Managing Authorities were conducted on: 18 February 2016 for Germany, 28 March 2016 for Greece, 11 February 2016 in Spain, 9 February 2016 for Finland, 30 March 2016 for Ireland, 17 February for Poland, 16 February 2016 for Romania.

[91] Additionally, other 500 individuals have been considered as potential beneficiaries but no specific gender target was set (NEETs).

[92] Additionally, further 138 individuals under the age of 25 have been considered as potential beneficiaries but no specific gender target has been set (NEETs). Among these, the number of women targeted under NEETS was 70 (approximately 50%). Consequently, considering the NEET beneficiaries as well, the overall number of potential beneficiaries is 276, 172 women, and 104 men.

market. For **men** re-employment may be easier by **informal channels**, while for **women formal re-employment** probably plays a major role.
For the two cases Odyssefs Fokas and Andersen Ireland, the exact number (and share) of women beneficiaries is not available yet as the interventions are still under implementation; however, in both cases, given the high share of women among the potential beneficiaries, the share of women among the final beneficiaries is expected to be high.

Table 6: Actual beneficiaries by sex and feminisation rate for the selected interventions in the seven Member States.

Member State	Intervention	Total	Women	Men	% women
Germany	BenQ	881	386	495	**45.7**
Greece	Odyssefs Fokas	N/A	N/A	N/A[93]	**N/A**
Spain	Galicia Metal	454	35	419	**7.7**
Spain	Valencia textile-2010	362	156	206	**43.0**
Finland	Perlos	915	346	569	**37.0**
Ireland	SR Technics	769	725	44	**5.7**
Ireland	Andersen	132	N/A	N/A[94]	**N/A**
Poland	Wielkopolskie	253	197	56	**78.0**
Romania	Nokia	1,595	1,089	506	**68.3**

Source: EGF application procedure material and author's own calculations.

3.3.3. Resources allocation for the intervention and actual expenditure

The **EGF resources** and the total resources allotted for every intervention are presented in the following table[95].
In the cases in which specific measures for carers were provided, **specific resources were budgeted** and **women benefitted the most** of them. Besides, no significant difference in the expenditure by gender has been reported at Member State level.

[93] Given the high share of women among the potential beneficiaries, also the share of women among the final beneficiaries is expected to be high. Unfortunately, this value is not available in the monitoring data provided by the Managing Authority.
[94] Given the high share of women among the potential beneficiaries, also the share of women among the final beneficiaries is expected to be high. Unfortunately, this value is not available in the monitoring data provided by the Managing Authority.
[95] An additional source of information is: European Commission (2012b), *EGF final reports and recoveries*, available at: http://ec.europa.eu/social/BlobServlet?docId=7493&langId=en.

Table 7: Total EGF committed and total EGF spent in the selected interventions in the seven Member States.

Member State	Intervention	Total EGF committed €	Total budget	Share of EGF	Total EGF spent €
Germany	BenQ	12,766,150	25,532,300	50%	10,273,723
Greece	Odyssefs Fokas	6,444,000	10,740,000	60%	N/A[96]
Spain	Galicia Metal	2,029,235	3,121,900	65%	1,618,194
Spain	Valencia textile-2010	2,059,466	3,168,409	65%	1,993,336
Finland	Perlos	2,028,538	4,057,075	50%	1,321,253
Ireland	SR Technics	7,445,863	11,455,174	65%	7,000,000[97]
Ireland	Andersen	1,501,200	2,502,000	60%	N/A[98]
Poland	Wielkopolskie	633,077 (of the total cost)	973,965	65%	N/A
Romania	Nokia	*2,942,680*	*4,527,200*	*60%*	N/A

Source: EGF application procedure material and author's own calculations.

96 As the programme is still open, financial accounts regarding the final EGF contribution spent cannot be provided.
97 Including co-financing.
98 As the programme is still open, financial accounts regarding the final EGF contribution spent cannot be provided.

3.3.4. Activated measures and specifically gender-relevant measures

Measures implemented in the seven selected cases are briefly described below.

In the **German BenQ case**, **measures** included job search assistance and general information, training and retraining measures, mobility allowances, short-term allowances (e.g. apprenticeship schemes, subsistence), and start-up incentives/promotion of entrepreneurship. The intervention offered especially group training courses at a large scale, which represented a quite successful instrument.

For the **Greek Odyssefs Fokas**, the following measures will be provided: occupational guidance, training, retraining and vocational training, contribution to business start-up, job-search allowance and training allowance, and mobility allowance. As the intervention is still under implementation, no measure has been activated yet. The call to participate (for unemployed people and NEETs) is open until the end of April.

In the first case selected for **Spain (Galicia Metal)**, the **measures envisaged** consisted of a coordinated package of: preparatory workshops; personalised services, made of occupational guidance and support to business creation or self-employment; intensive job-search assistance; general training[99] towards compulsory school, job search techniques, horizontal skills, vocational and skills upgrading, training in entrepreneurship, and entrepreneurship and business management; on-the-job training; and participation, outplacement, entrepreneurship, commuting, geographical mobility, and on-the-job training economic incentives. Specific **economic incentives were envisaged for carers of dependent people** (children, elderly, or people with disabilities); this represented a gender-relevant measure. For the **Valencia Textile-2010** case, the measures envisaged included **support for the care of children and dependent people.** Besides, the measures implemented in this case include customised pathways to employment, underpinned with important economic incentives to participation, mobility, access to employment, and entrepreneurship. The overall approach aimed at forming a coordinated package of personalised services to reinclude workers into the labour market: preparatory activities and accompaniment; training; promotion of entrepreneurship; intensive job-search assistance; and a set of economic incentives to participation in the programme and to mobility. It should be noted that one training measure that was particularly successful for this intervention regarded training as qualified care workers.

For the **Finnish case**, the activated measures were: job search assistance, occupational guidance, training, job search and mobility allowances, measures to stimulate older and disadvantaged workers, entrepreneurship promotion (start-up grants), and pay subsidy vouchers.

In **SR Technics** (**Ireland**), the activated measures consisted in training. The training measures included: occupational guidance; IT training; specific EGF tailored mechanic/avionic training; entrepreneurship training; advanced third-level qualifications in aviation, engineering, and transport; and other more flexible and individualised training opportunities. As for the **Andersen** Ireland case (implemented in Ireland as well), the activated measures encompassed the career development training grant and training courses. Participation has been limited as for third-level courses, internships, and entrepreneurial enterprise support, probably because of the lower education attainment

[99] As the majority of the target beneficiaries (53%) have not completed compulsory education, the personalised intervention includes a measure to support beneficiaries in the achievement of the compulsory school certificate.

status of the beneficiaries. Eventually, participation has been relevant for other training support allowances, such as the Course Expense Contribution (CEC) designed to assist with **the day-to-day costs** associated with undertaking training, including travel, subsistence, and **childcare costs.**

The measures activated for the **Polish case** (**Wielkopolskie**) were: help in job searching (55), career consultation (52), training and retraining (197), entrepreneurship promotion and aid for self-employment (27), training allowances (197), equipment and refitting of workplaces (24), and internships (11). All measures were carried out by local employment offices (*Powiatowy Urząd Pracy*).

In the **Nokia** case analysed for **Romania**, there are seven categories of activities: pre-dismissal services; registering as job-searching people; information, counselling, and vocational orientation (including allowances for mobility, transport, etc.); vocational training (training courses, internships, entrepreneurship, and assistance to start an independent business); support in preserving the new job; and **allowances for childcare facilities**.

Gender-relevant measures activated in each intervention are **presented** in the **following table**. Gender-relevant measures are those measures that it is known in advance that will benefit women the most, even when they are targeted at all beneficiaries. This is the case of care services, which benefit women the most; care, as statistics (particularly but not exclusively those on time use) show across EU-28 Member States, is still mainly women's responsibility.
In some countries, **gender-relevant measures** have been implemented; in other countries, the **individual tailored approach** that characterises the EGF intervention has provided women with other useful assistance tools.

Table 8: Type of activated measures that benefitted women

Member State	Intervention	Individual tailored approach	Gender-relevant measures
Germany	BenQ	EGF was used to provide highly individualised assistance and training for specific groups including women.	
Greece	Odyssefs Fokas	N/A	N/A
Spain	Galicia Metal		Economic incentives were envisaged for carers of dependent people (children, elderly, or people with disabilities)

Spain	Valencia textile-2010		Economic incentives were envisaged to support care of children and dependent people
Finland	Perlos	Occupational guidance was the measure most chosen by women.	
Ireland	SR Technics		Childcare supports were provided to eligible clients who needed to avail themselves of thereof in order to complete their EGF co-financed intervention.
Ireland	Andersen		No specific 'women-oriented' measures have been reported. Nonetheless, the CEC scheme, which is a specific EGF-enabled scheme, provided for flexible financial assistance in attending training and specifically included coverage of childcare costs.
Poland	Wielkopolskie	Provided training was 'tailor-made', i.e. it had been planned according to each beneficiary's needs and preferences.	
Romania	Nokia		Financial support was provided for childcare services (kindergartens and baby sitters).

Source: EGF application procedure material.

3.3.5. Gender differences in results and impacts of the adopted measures

For the intervention selected in **Germany** (**BenQ**), the Eurofound report states that the most **vulnerable groups** of affected workers were considered to have benefitted most from the additional assistance that was made available as a result of EGF funding. These groups included: older workers, low-skilled workers, and **women** – **particularly single mothers**. The EGF was used to provide highly individualised assistance and training for these groups as well as peer-group support organised for particular targets groups, which was not part of the general offer of the transfer company model. At the end of the project (28 February 2010), 385 people (180 women) from the original 1,305 beneficiaries were in employment or self-employed (22 women). About 737 people (479 women) were unemployed and 183 inactive (136 women). From the latter group of 136 women, 88 women were in training measures. **At the end of July 2010, a sample showed that 42 people more (of whom, 69% were women) were gainfully employed**. According to the national contact point, a successful job placement was mainly related to the educational status of the job searchers and not to gender. According to the Eurofound report on Perlos and BenQ, many of the female beneficiaries had childcare and family responsibilities, and found it more difficult to relocate for employment. The fact that the rate of success seems to be related to the initial conditions of redundant workers is a very interesting result that should be considered with attention.

The intervention selected in **Greece** (**Odyssefs Fokas**) did not include gender-relevant measures to improve women's participation in the labour market although the majority of target beneficiaries are women. In fact, all of the interventions were very similar (regardless of sector and gender composition) – even the wording was identical. The intervention is going to be completed by April 2017. At this stage, there exists **no available information concerning the results and/or impacts**. The design of the intervention follows a very rigid and universal pattern of measures that are identical in all other interventions (with very small differences, as mentioned earlier).

The **Galicia Metal** intervention selected in **Spain** included specific **economic incentives** for **carers of dependent people (children, elderly, or people with disabilities)** of up to 50% of their monthly care expenses up to EUR 300, aimed at covering the additional costs faced by the workers with caring responsibilities in order to avail themselves of training or other measures. It was envisaged that 40 people would benefit from this, while the actual implementation covered 65 cases, although the **cost of the measure has been much lower than foreseen** (EUR 14,000 against EUR 48,000 allocated[100]), due to some reluctances/difficulties **encountered in spending** the money in some small villages (according to the collected additional information). As in the final report, at the end of the assistance, 186 workers were employed, of whom 8% are women (similar share of participation). Of these 186 people working afterwards, 16 (8.6%) were self-employed: interestingly, 19% of these self-employed were women, thus more than doubling their participation share. On the other hand, the share of women unemployed or inactive was much lower. The programme did take into account the role of women as carers, but the amount envisaged was not spent. According to the Managing Authority, in some small rural areas, women preferred meeting their care needs with informal care to using the provided option. This is an interesting result that needs to be taken into account by national Managing Authorities when designing these measures: they have to be designed in order to be actually usable by beneficiaries.

[100] Information gathered from the Managing Authority in Spain.

Gender differences in results, impacts, and final outcomes are mostly **related** to **external factors** like **gender segregation** in the **prevailing sectors of the area** than to internal factors of the programme. For this reason, more women may have opted for self-employment, as mentioned above.

As to the **Valencia textile-2010** case selected in **Spain**, two activities stand out from a gender perspective: 1) training as qualified care workers (through the so-called 'social workshops'), which provides a response to detected needs in the various geographical areas, as well as to employment needs (it is a long training action linked to the national system of qualifications, that has absorbed **64% more budget than initially expected** due to this long duration); 2) the **specific incentive mobility allowance**, **initially** intended to compensate for transport costs and actually partly devoted also to **cover conciliation costs of people with family responsibilities** (with up to EUR 125 a month). The latter was the incentive with the highest share of women recipients (47%), and included a mobility and **care incentive for beneficiaries with children and dependent people** (up to EUR 500 a month, 47% women), while for the former the final report does not provide disaggregated data by sex in relation to the total number of participants (55), which represents one fifth of the total targeted beneficiaries; however, according to the collected information, **presumably a higher number of women have participated than men**.

For the intervention selected in **Finland**, **Perlos**, there do not seem to have been purposefully gender-relevant measures, but **it turned out** that women preferred some activities rather than others much more actively than men. For instance, **80%** of **those participating in occupational guidance were women**. All in all, women aged over 50 were the most active in using different measures. The employment rate of former Perlos workers grew steadily for 11 months after they were laid off by the company. Over 57% of the workers were employed 11 months after being made redundant. Unemployment grew slightly between seven and 11 months due to the high number of workers finalising their studies and re-entering the labour market. Men were three times more likely to find a new job than women. Women were three times more likely to take up training after the intervention than men. For women, the first unemployment period had lasted longer than for men, on the average, and women more often than men had several periods of unemployment in 2007–2008 (Jolkkonen et al., 2012)[101]. **After the conclusion of EGF measures, 59% of beneficiaries were re-employed**. The vast majority of those inactive were studying, some being on family leave or long-term sick leave. **Three years after the redundancies had taken place for the first time, in June 2011, 88% of men and 76% of women were re-employed**. However, the differences seem to be bigger between age groups than between genders. According to Jolkkonen et al. (2012), **women had had to be more flexible in their re-employment**: 28% of re-employed women against 9% of men were in fixed-term employment, the length of which, on the average, was six months for women and 10 months for men; women also were re-employed through temporary work agencies more commonly than men. Fifty-eight per cent of men and 48% of women were re-employed in the manufacturing sector, while 10% of men were re-employed in construction and 19% of women in healthcare and social services. The **EGF intervention in Perlos seems to have been a success** in general. Jolkkonen et al. (2012) conclude that the measures provided and their needs were well met, and the ones who benefitted the most were the so-called 'risk groups': blue-collar workers, women, and older workers. The prevalence of temporary employment relationships among re-employed Perlos female workers is, in principle, in line with the Finnish labour market in general, where women much more commonly have

[101] Jolkkonen, A., Koistinen, P.,. and Kurvinen, A. (2012), 'Displaced Workers – The Case of a Plant Closing on a Remote Region in Finland' in *Nordic Journal of Working Life Studies*, vol. 2, no. 1, pp. 81–100.

temporary employment relationships than men. To conclude, **the implementation of the EGF** intervention **could not make a difference from a gender perspective** also because it did not take into account the fact that women are more likely to have temporary contracts. The share was even higher among these re-employed women, though, than among all female employees. Finnish women also tend to study and seek to attend training courses more commonly than men.

The **two interventions** adopted in **Ireland** did **include gender-relevant measures**.

However, in the **SR Technics** case, a **flexible approach to training times** was adopted to allow for the 'widest availability and accessibility to clients, including women', and specific **'childcare supports were provided to eligible clients** who needed to avail themselves of them in order to complete their EGF co-financed intervention'. Though, no further details are provided regarding the success of this childcare support measure, take-up rate, etc. The main results of the intervention regarded **334 employed upon completion of the assistance programme, of whom 6.6% were women**. This indicates slightly better outcomes for women, who accounted for only 5.4% of all beneficiaries, so that of the 44 women benefitting from assistance, 22 gained employment, representing 50%. Men's success following completion of the assistance programme was 44%. As noted, there were slightly better outcomes for women beneficiaries when compared to men; there were also some childcare support measures implemented that must have contributed to the success of at least some women finding employment, by enabling them to take up the various training measures offered. Again, gender differences are extremely marginal in terms of outcomes. The better outcomes of women can be attributed to their higher educational standards relative to men's standard of education, with individuals (both women and men) with the highest levels of educational attainment showing the greatest levels of disparity. Among the actual beneficiaries, 11.6% of women had completed 'tertiary education' (ISCED 5 and 6) (level 7, 8, 9, and 10).

As for the **Andersen Ireland case**, the overall labour market outcomes for company workers have been very positive – the overall unemployed among targeted workers being 7% – with the sub-cohort of **132 EGF beneficiaries** featuring an **unemployment rate** of 7.6%, **lower** than the **national average.** Unfortunately, there is no **gender-**disaggregated analysis of labour market outcomes available. Nevertheless, additional information provided by EGF Ireland does not demonstrate that a significant gender difference in labour market outcomes exists for Andersen Ireland workers, with 71% of men and 68% of women in employment. On the whole, the **CEC scheme**, together with the Back to Education Allowance[102], which is not an additional EGF scheme, seems to have **mitigated hindrances encountered by women with caring responsibilities in accessing EGF training programmes**. Even though most of the Andersen Ireland affected workers' reemployment has been in traditionally male-dominated sectors – such as 'craft and related trades' and 'plant and machinery operations' – no specific negative implications for Andersen Ireland female workers have been stressed: reemployment levels among Andersen Ireland affected workers have been on the whole very positive and better than the national average[103].

[102] The Back to Education Allowance was aimed at providing income support to certain categories of individuals – including job seekers, one-parent families, and those with care responsibilities – in order to ease full-time attendance.

[103] However, Irish experts have underlined that the abovementioned positive trends are probably due to the overall improving economic situation and decreasing unemployment rates, rather than to the EGF intervention.

In the intervention selected in **Poland** (**Wielkopolskie**), training was the most popular measure (197 beneficiaries). The training provided by the project was 'tailor-made', planned according to each beneficiary's needs and preferences. **Some of the training was in fields chosen more often by women:** accounting and HR; shop assistance (cash register operator); care of children and elderly; fashion, hairdressing, and make-up; and chef assistance. Other training types included language courses (which are often very favoured by women) and driving lessons. Available data on the results/impacts of the project regard the end of the project. The success rate of the project was 64%. However, the success rate for men and women varied considerably: 82% for men and 62% for women (out of 162 beneficiaries employed by the end of the project, 119 were women and 43 were men). The **difference in the success rate** of **men and women raises questions** about the selection of **measures** available by **gender** (type of measures and training field) and the opportunities to find jobs in the chosen professions and sectors. Data on the gender of beneficiaries of specific measures are unavailable. There is no mention of specific measures aimed at easing women's responsibilities as caretakers or other gender-relevant arrangements with the aim of increasing gender equality. The difference in the number of male and female beneficiaries is directly connected to the number of workers laid off (1,104): 75% of laid-off workers were women and 78% of beneficiaries were women. The **question of why such a big portion of laid-off workers were women would require more attention by the EGF national Managing Authority**.

In the intervention selected in **Romania**, the **Nokia** case, the application for funding included the commitment to the 'gender equality and non-discrimination principle' in all programme measures. Implemented measures included: pre-dismissal services; registration of workers; information, counselling, and vocational guidance; mobility allowances; transport allowances; job search allowances; training; internship allowances; financial assistance for training programme certification; entrepreneurship promotion; financial assistance for initiating independent activities; mentoring and post-hiring support; and **financial assistance for people with children**. Financial support was provided for childcare services including **both kindergartens and babysitters**. The measure was expected to improve women's participation in programme activities, but very few women actually used this opportunity although the measure was very flexible as it included babysitting.

Data **show a gender-related difference in the results of the programme**. At the end of the implementation, **654 women** were **employed** out of a **total** of **1,007 female beneficiaries,** and **353 men** were employed out of **506 male beneficiaries.** The **success rate** is **higher for men** than for women: **69.8%** and **60.1%**, respectively. Support for caregivers was provided. There is no information about any internal limitation of the programme that could contribute to gender differences related to results or impacts of the funded measures. There is **no documented evidence on the impact of external factors** hindering better achievements for women.

3.4. Implemented measures and gender segregation: any follow-up from the Perlos and BenQ cases? Special reference to the German and Finnish situation

The **success** of the **Perlos** case in **Finland** has been used to **develop** a **model** that can be **applied to many other companies** and authorities. The Finnish Regional Employment and Economic Development Centre has also implemented an action plan based on this experience in order to develop a policy that can be applied to similar cases. According to a specific study carried out by the University of Joensuu (Jolkkones and Kurvinen, 2012), the employee group that has benefitted the most from the Perlos case is composed of the most vulnerable workers, such as older workers, low-skilled workers, and women. Women and older workers have also been the employees who have most actively participated in the measures. As for single parenthood or care responsibilities issues, no data are available even though regulations for the 2014–2020 period are currently including care allowances in connection with training allowances.

In the EGF intervention at **BenQ** in **Germany**, the provision of **individualised support** was one of the key features and represents a **good example** of labour market measure in Germany. This meant that the highest level of assistance was offered to those most in need of guidance, upskilling, and other interventions in order to be able to re-enter the labour market. According to the national Managing Authority, at BenQ workshops were particularly offered to women and were also dealing with the gender effects of layoffs. Regarding qualification and placement, the fact that **women might have care responsibilities was taken into account, and part-time work** was offered. One example from BenQ: women received driving licences for buses and two former female BenQ employees later shared the job of a school-bus driver. However, according to Eurofound, many female beneficiaries were bearing childcare and family responsibilities, and found it hard to re-enter the labour market**. Nowadays more attention is paid to gender equality**.

3.5. The EGF and the Youth Employment Initiative

In order to **reduce youth unemployment** and to increase the youth employment rate in line with the **Europe** 2020 targets, the European Union launched in 2012 the Youth Employment Package (2012), which included measures to help Member States tackle youth unemployment by providing young people with offers of jobs, education, and training. The package included:

- the Youth Guarantee – adopted by the Council in April 2013;
- a social partner consultation on a quality framework for traineeships, followed by a European Commission proposal for a Council recommendation in December 2013 – adopted by the Council in March 2014[104];
- the European Alliance for Apprenticeships and ways to reduce obstacles to mobility for young people.

Besides the package, the European Commission launched in **2013** the **YEI** aimed at **reinforcing** and **accelerating** the measures outlined in the Youth Employment Package. It aims to support particularly young NEETs in regions with a **youth unemployment rate above 25%**.

The **YEI** has been **designed** to **support young NEETs**[105], including **long-term unemployed youngsters** or those not registered as job seekers. The YEI supports the provision of:

- apprenticeships;
- traineeships;
- job placements; and
- further education leading to a qualification.

[104] Council Recommendation of 10 March 2014 on a Quality Framework for Traineeships, available at: http://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1411116781313&uri=CELEX:32014H0327%2801%29.

[105] Eurofound (2012), *NEETs - Young people not in employment, education or training: Characteristics, costs and policy responses in Europe*, available at: http://www.eurofound.europa.eu/publications/report/2012/labour-market-social-policies/neets-young-people-not-in-employment-education-or-training-characteristics-costs-and-policy.

The **YEI** is complementary to other actions undertaken at national level, including those with the ESF and the EGF support. As to the latter, the eligibility clause in the 2014–2020 programming period regulation[106] under Article 6 specifies that: ‘By way of derogation from Article 2, applicant **Member States** may, **until 31 December 2017**, provide personalised services co-financed by the EGF to up to a number of NEETs **under the age** of **25**, or where Member States so decide under the age of **30**, on the date of submission of the application, **equal to the number of targeted beneficiaries**, as a priority to persons made redundant or whose activity has ceased, provided that at least some of the redundancies within the meaning of Article 3 occur in NUTS 2 level regions eligible under the Youth Employment Initiative. The support may be rendered to NEETs under the age of 25, or where Member States so decide under the age of 30, in those NUTS 2 level regions eligible under the Youth Employment Initiative.’

3.6. The EGF and the Youth Employment Initiative: the interventions

So, **for every EGF intervention**, also **NEETs can be included** among targeted beneficiaries besides the original target group of workers made redundant due to globalisation or the economic crisis. At present, **there are five interventions** under implementation that include NEETs among targeted beneficiaries. Three of them have been already described in other sections of the present report. The table below includes all of them.

Table 9: The selected interventions under the YEI.

Member State	Intervention	Intervention number
Greece	Nutriart	EGF/2014/001
Greece	Odyssefs Fokas	EGF/2014/013
Greece	Sprider Stores	EGF/2014/009
Ireland	Andersen Ireland	EGF/2014/007
Ireland	Lufthansa Technik	EGF/2014/016

The five EGF interventions that have been extended to a group of beneficiaries among NEETS are under implementation in **Greece** (Nutriart, Odyssefs Fokas, and Sprider Stores) and **Ireland** (Andersen Ireland and Lufthansa Technik). All interventions were approved in 2014. There are **no gender specific targets** for the sub-groups of NEETs **specified in the intervention descriptions**. However, as to the Andersen Ireland case, during the implementation phase a target of 70 women (approximately 50% of the total) was set. In Ireland the age group defining NEETs includes young people under the age of 25, while in Greece NEET beneficiaries should be under the age of 30. In the three implementation cases in Greece, targeted NEETs will be identified according to the criteria included in the Greek Youth Guarantee Implementation Plan (i.e. young people at risk of exclusion, level of household income, educational level, duration of unemployment, etc.), as well as expressions of interest. For this purpose, they intend to launch information campaigns specifically aimed at NEETs.

[106] Available at: http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2013:347:0855:0864:EN:PDF.

Table 10: Targeted NEETS beneficiaries and age groups for the selected interventions under the YEI.

Member State	Intervention	Total	Age group
Greece	Nutriart	505[107]	<30
Greece	Odyssefs Fokas	600[108]	<30
Greece	Sprider Stores	550[109]	<30
Ireland	Andersen Ireland	138[110]	<25
Ireland	Lufthansa Technik	200[111]	<25

Source: EGF application procedure material and author's own calculations.

The interventions are still under implementation and there is no information available for any of them, with the only exception of **Andersen Ireland**. So far, **129 male NEETs and 113 female NEETs** have been identified as potential beneficiaries and contacted with a view to involving them in the programme.

3.6.1. Resource allocation for the YEI intervention and actual expenditure

Resource allocation in the selected cases for each of the five interventions under the YEI is presented in the following table. It should be noted that there is no earmarked budget for NEET beneficiaries **as all beneficiaries** are **equally considered** for the intervention. As the programmes are still open, financial accounts regarding the final EGF contribution spent cannot be provided.

[107] nder the age of 30.
[108] Under the age of 30.
[109] Under the age of 30.
[110] Under the age of 25.
[111] Under the age of 25.

Table 11: Total EGF committed and total EGF spent in the selected interventions in the seven Member States.

Member State	Intervention	Total EGF committed EUR	Total cost	Share of EGF
Greece	Nutriart	6,096,000	10,160,000	60%
Greece	Odyssefs Fokas	6,444,000	10,740,000	60%
Greece	Sprider Stores	7,290,900	12,151,500	60%
Ireland	Andersen Ireland	1,501,200	2,502,000	60%
Ireland	Lufthansa Technik	2,490,758	4,151,264	60%

Source: EGF application procedure material and author's own calculations.

3.6.2. Activated measures and specifically gender-relevant measures for the YEI interventions

Measures implemented in the five cases are briefly described below.

The **Nutriart** intervention implemented in Greece envisaged the following measures: occupational guidance; training, retraining, and vocational training; specific counselling services towards entrepreneurship and development of an incubator; contribution to business start-up; job-search allowance; and mobility allowance.

For the Greek **Odyssefs Fokas** case, the following measures are being provided: occupational guidance; training, retraining, and vocational training; contribution to business start-up; job-search allowance and training allowance; and mobility allowance. As the intervention is still under implementation, no measure has been activated yet. The call to participate (for unemployed people and NEETs) was open until the end of April 2016.

The **Sprider Stores** implementation case in Greece provides for: occupational guidance; training, retraining, and vocational training; contribution to business start-up; job-search allowance and training allowance; and mobility allowance.

As for the **Andersen** Ireland **case** (implemented in Ireland), the activated measures encompass the career development training grant and training courses. Participation has been limited in third-level courses, internships, and entrepreneurial enterprise support, probably because of the lower educational attainment status of the beneficiaries. Eventually, the participation has been relevant for other training support allowances, such as the CEC designed to assist with the day-to-day costs associated with undertaking training, including travel, subsistence, and childcare costs.

For the **Lufthansa Technik** case (Ireland), the following measures are provided: guidance and career planning; training grants; training and further educational programmes; higher educational programmes; enterprise and self-employment supports; and income supports including the CEC scheme. The personalised services that are to be provided to NEETs consist of the same options as for redundant workers but will be tailored on each NEET individual as appropriate.

4. THE FEMALE-DOMINATED GENERAL GOVERNMENT SECTOR: A NEW FIELD FOR EGF INTERVENTIONS

KEY FINDINGS

- The **general government sector** is **female-dominated** in terms of occupational segregation as it is the main employer of working women in many EU Member States.
- The general government sector is **not** formally **excluded** from the scope or goals of the **EGF intervention**: however, **up to now** there have been no cases of EGF intervention in this sector but **only in** some **public-owned companies** that belong to the wider public sector.
- **Employment** in the **general government sector** has been **affected** by the economic **crisis** during its second phase, when retrenchments in public expenditure have been implemented to face the financial crisis.
- **No recent gender**-disaggregated comparable **data** exist for **EU** Member States. **Data** collected in the seven **selected Member States** (with the obvious limitations of comparability) **show** that a **reduction** in the number of employees has taken place in the majority of them.
- The **impact** of the **crisis** on this sector, however, has been **less dramatic** but **not less intense** than on the other employment sectors where the economic crisis hit at first. Furthermore, in the same time span, the **quality of work** in this sector **deteriorated**. This is especially, but not only, the case of Member States where, in order to respond to the economic crisis, severe cuts to public expenditures have been implemented.
- **National gender experts** have been asked to give their **opinion** about the possibility to **extend** the application to the **general government sector,** but they did not come to a unanimous view since the economic and financial situation presents specific **peculiarities** in each **country context**.

4.1. The public sector and women as employees

According to the **OECD**[112], the **public sector** comprises the **general government sector** (public administration and the provision of welfare services) plus all public-owned corporations including the Central Bank. In most of the advanced economies[113], the public sector includes a relevant part of the national economy providing basic goods or services that are either not, or cannot be, provided by the private sector. The public sector plays a key economic role as regulator in the economy, service provider, and employer: in **2013** it **accounted** for '**more than 25% of total employment** and a significant share of economic activity in the EU'[114].

The public sector is **not formally excluded** by the **EGF intervention** as there are no such limitations in the scope or goals expressed in the existing regulations. In fact, the EGF has

[112] Glossary of statistical terms available at: https://stats.oecd.org/glossary/detail.asp?ID=2199.

[113] 'Advanced economies' is the definition adopted by the IMF in the yearly publication 'World Economic Outlook' for countries that present high: 1) per capita income level; 2) export diversification – so oil exporters that have high per capita GDP would not fall under the advanced classification because around 70% of their exports are represented by oil; and 3) degree of integration into the global financial system. The definition is available at: https://www.imf.org/external/pubs/ft/weo/faq.htm#q4b.

[114] European Commission (2013), *European Public Sector Innovation Scoreboard 2013*, p. 4, Available at: http://www.technopolis-group.com/wp-content/uploads/2014/06/1540_EIS-2011-12_EPSIS-2013.pdf.

been already applied to the public sector (for instance to public-owned companies). However, up to date there are **no cases** of **EGF intervention** in the **general government sector** – including the public administration and the provision of welfare services such as education and health. According to the EGF Managing Authority, **a case of application is presently under study**[115].

Existing data show that the general government sector – including the public administration and the provision of welfare services – is the **main employer** of working **women** in **many EU Member States** (see also gender segregation data presented in Chapter 2). This sector is **very attractive** for women as it provides for very high protection and security (in many countries, contracts in public employment guarantee better conditions for maternity and parental leaves besides higher protection from dismissal than working contracts in the private sector), as well as working time flexibility in terms of overall time of work, and time working schedules that allow for better work–life balance. However, these advantages are neutralised by low wages and little career prospects. To guarantee **loyalty among employees**, the **public sector** often used to **offer**, and in many cases still offers, the **most advanced solution** in terms of **collective contracts** for open-ended contract holders[116].

The **recent economic crisis** has **entailed retrenchments** in the **public expenditure**, which have accelerated ongoing processes of reform of welfare states across the EU[117]. The role of the general government sector as women's employer is getting smaller, and some of the **ongoing processes** of **reform** include both **cuts in personnel** and **reduction in quality of work**. The former might be tackled also by adopting instruments such as the EGF to provide tailored support to redundant workers, including women.

4.2. Data analysis on available gender data on the public administration

4.2.1. Analysis of available gender data on the general government sector and the gender segregation issue at EU-28 level

Concerning the **number of women** working in the general government sector, **no recent** official **gender-**disaggregated comparable **data** for all EU Member States are available. Eurostat announced that data about civil servants will be made available during the first quarter of 2016[118]; however, for the time being, data have not been published yet.

The **most recent data** available at EU level on the public administration are found in the report 'Public employment in European Union Member States' published by the Spanish Presidency of the European Union in **2010**[119]. That study provided a summary of the most important aspects of public employment within the community framework by means of a comparative analysis; however, the study **did not provide gender**-disaggregated cross-country **comparable data** for EU Member States.

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[115] Consultations with the EGF Managing Authority in the Member State.

[116] See also Anghel, B., de la Rica, S. and Dolado, J. J. (2011), 'The Effect of Public Sector Employment on Women's Labour Market Outcomes', IZA working papers, available at: http://library.bsl.org.au/jspui/bitstream/1/2679/1/Effect%20of%20public%20sector%20employment%20on%20womens%20labour.pdf.

[117] Vaughan-Whitehead, D. (2013), *Public Sector Shock: The Impact of Policy Retrenchment in Europe*, Edward Elgar.

[118] Information provided on the Eurostat website (http://ec.europa.eu/eurostat/statistics-explained/index.php/Civil_servants_in_the_EU_member_states#Civil_servants_statistics_in_general). The website was last visited on 29 February 2016.

[119] The report 'Public Employment in European Union Member states' is available at: http://www.dgaep.gov.pt/upload/RI_estudos%20Presid%C3%AAncias/Public_Employment_EUMS.pdf.

According to **an estimation made** by Burchell et al. (2014) for the EU, 'In all occupations, **women have** higher shares of total employment in the public services than in the private sector'[120]. The authors highlight that there is a very high concentration of women in public services, **particularly** of **highly educated women**. They observe that nearly **three fifths of women** with tertiary education who are **employed** in the EU **work** in one of the 'three public services of public administration, education and health'[121]. Rubery (2014)[122] states that **women account** for a **much higher share** of the public sector than the private sector (she estimates 68–76% compared to 40–50%) in the EU.

4.2.2. Analysis of gender data on the public administration and the gender segregation issue in seven selected Member States

Public administration is considered to be a **peculiar sector** both in **economic** and **gender** terms. In fact, public employment has been **affected by the crisis later**, and its impact has been **less dramatic** than in the other economic sectors; moreover, as for gender segregation, it is **generally considered to be a female-dominated sector**. For this reason, it is important to analyse the impact of the crisis on public employment (Rubery, 2013)[123] since it is of absolute relevance in order to understand the trends concerning female employment and the **evolution of gender segregation**. As in the previous sections, a **state-by-state analysis** will be developed.

Considering eventually the **German case**, the **public administration sector** has **not** been **affected** by economic and financial crisis. The overall **number of employees** (including defence activities) **slightly increased** over the years from 4,599,400 in 2005 to 4,652,500 in 2014, with a slight decrease only in the first year of the crisis, i.e. 2010 (4,568,100 employees). In this case as well, the increase in overall employment has been **combined** with a **deterioration of work conditions**: **part-time** employees increased from 1,153,600 in 2005 to 1,345,600 in 2014. On the whole, the employment rate reduction has not affected the German public sector since major reforms – including reduction in the number of employees – had been introduced in the public sector by the Government before the outburst of the crisis.

As for **Greece,** public-sector **employment decreased** by 28.3% between 2009 and 2013 (943,000 employees in 2009 and 676,000 in 2013). This trend **continued even after 2013** when public-sector employment further reduced to 566,000 units. These dynamics can be explained considering the second Memorandum of Understanding signed by the Greek Government: this agreement entailed the **layoff** of **15,000 public employees**, which was gradually **reduced to 5,000** and to a **smaller number afterwards**. Moreover, additional public-sector jobs were cut between 2013 and 2014 because of the dismantling of the National Broadcast Corporation, the Municipal Police, and the layoff of around 200 public cleaners; nonetheless, **all of them** were **rehired in 2015**. The main part of public employment **reduction** is due to **retirement and early retirement** rather than to a dismissal policy: retired civil servants have not been replaced by new recruits. This policy **applied to women more than men**. As for gender segregation in the public sector, the

[120] Burchell, B., Hardy, V., Rubery, J. and Smith, M. (2014), *A New Method to Understand Occupational Gender Segregation in European Labour Markets*, p. 84, European Commission, available at: http://ec.europa.eu/justice/gender-equality/files/documents/150119_segregation_report_web_en.pdf.

[121] Burchell, B., Hardy, V., Rubery, J. and Smith, M. (2014), *A New Method to Understand Occupational Gender Segregation in European Labour Markets*, p. 108, European Commission, available at: http://ec.europa.eu/justice/gender-equality/files/documents/150119_segregation_report_web_en.pdf.

[122] Public presentation held at ILO and available at: http://www.ilo.org/wcmsp5/groups/public/---ed_protect/---protrav/---travail/documents/meetingdocument/wcms_184240.pdf.

[123] Rubery, J. (2013), 'Public sector adjustment and the threat to gender equality', in Vaughan-Whitehead, D. (2013), pp. 43–82.

composition of the sector has remained all in all stable during the considered period: women share was 46.3% in 2010, 46.5% in 2013, and 46.7% in 2015.

The **Spanish case** perfectly reflects what has been reported in the previous paragraph. The employment trend in the public sector can be divided into two very different phases. The first one (**2008–2011**), coinciding with the outburst of the crisis, has been characterised by a significant increase in the employment rate: 10.6% in accumulated terms, compared to -13.3% of the private sector. **Women** have benefitted more from the **creation of jobs in the public administration** than their male colleagues: the female employment rate in the sector has increased by 11.3% in the considered period; the male employment rate has increased by 9.8%. During the **second phase** (2011–2013), the **public sector suffered job losses** due to the financial crisis. In accumulated terms, public jobs have been reduced by -10.7%. **Men have suffered the most** from this trend: male employment in the public sector has decreased by **-12.1%** in the considered period, whereas **female** employment has been reduced by **-9.6%** in the same period. In absolute terms, in two years (**2011–2013**), **355,000 public jobs were destroyed** in Spain (185,000 among men and 170,000 among women); nonetheless, given the relevant increase in female employment in the first phase, the share of women in public employment increased by 1.1 p.p. (from 53.7% in 2008 to 54.8% in 2013).

The **Finnish case** is **consistent** with the **scenario described** above concerning the public administration. The overall number of employees **slightly increased** in the considered period by 2,000 units (1,000 men and 1,000 women) from **2008 to 2013** and by further 5,000 units (1,000 women and 4,000 men) in **2014**. Consequently, the increase in public employment **concerned mainly male employees** even though **it remains** a **female-dominated** sector (the female employment share represents 71% in 2014 with 481,000 units). **Employment reduction** has been registered if considering the public administration and defence sector with 11,000 layoffs in the considered period: this reduction, however, is mainly due **to retirement of aged personnel** who has not been replaced by new recruits. Direct dismissals have not been a common tool for personnel reduction in the public sector, even though it may be more frequent in the forthcoming years since it is included in the Government's strategy in force since June 2015. A specific remark needs to be included as for university: the **University of Helsinki**, which currently employs more than 8,000 people (58% women), has **announced** an **employment reduction** of 1,200 people.

As for **Ireland,** a wider **definition** of public sector – including education, healthcare services, and social work, but excluding defence – has been used. On the whole, the public sector **does not** seem to have been **affected by the economic and financial** crisis: job losses have been achieved through voluntary redundancy and recruitment moratoria; employment rate moderately grew, albeit the quality of employment deteriorated due to the increase in part-time, short-term, zero-hour, and low-hour contracts and to the use of agency workers. As to the **increase** in the employment rate, the number of employees in the public sector was 456,100 units in 2008 (330,900 women) and 482,500 in 2013 (343,500 women). This trend **continued** in **2014** as well, with the number of employees reaching 488,600 units. The overall growth in public administration employment registered in the considered period has **had a positive impact** on **female employment** considering that the public administration is all in all the sector in which women are mainly employed.

As for **Poland**, the **public sector** is a **female-dominated sector** with a female employment share of 61% in 2008, which increased up to 64% in 2014. This sector has been **moderately affected** by the impact of the financial and economic crisis **with a decrease** in the employment rate of 7% (243,847 layoffs) between 2008 and 2014: the employment decrease reaches 11% if defence and compulsory social security are excluded from public employment statistics. On the whole, **women represent the majority of public-sector employees**, and their share has increased in the considered period: by consequence, gender segregation has increased too. However, it is important to report that **employment quality** in this sector has **changed over the years**: traditionally, public employment is considered to be less paid but more stable than private-sector employment. This feature has gradually changed since public employment has **become more unstable** and the quality of work deteriorated: part-time or ‘atypical’ jobs are more frequent; many public-sector jobs have been **outsourced**; the cost of work has been reduced. These changes have intensified due to the crisis, and this evolution has mainly affected female work.

As for **Romania**, the public administration has resulted to be a **female-dominated sector** with a **female employment rate** scoring 70% in 2008, and 71% in 2013 and 2014. A relevant decrease in the number of employees during the hardest times of the financial and economic crisis (2008–2013) can be noticed with a small, more recent recovery (2014). However, the **cumulated employment decrease** in the public sector strongly affected education, healthcare, and social work – which are the three main female-dominated sectors, so that about 70% of job losses concerned **women**.

Table 12: Total employment and feminisation rates in the general government sector in 2008, 2013, and 2014 in the seven selected Member States.

Member State	Total empl. 2008	Femin. rate 2008	Total empl. 2013	Femin. rate 2013	Total empl. 2014	Femin. rate 2014
Germany	4,599,400[1]	n.a.	4,568,100[2]	n.a.	4,652,500[3]	63.4%[3]
Greece	942,625[4]	n.a.	675,530 599,207[5]	46.5%	576,856[6]	46.6%
Spain[6]	2,636,900	52.7%	2,576,746	53.4%	2,542,787	54.1%
Finland	666,000	71.9%	668,000	71.9%	673,000	71.5%
Ireland	456,100	72.0%	482,500	71.0%	488,600	n.a.
Poland	3,570,700	61%	3,375,000	n.a.	3,377,100	64%
Romania[7]	957,000	70%	823,000	71%	829,000	71%

Source: EGF application procedure material and author's own calculations.
[1] Refers to 2005 and includes defence.
[2] Refers to 2010 and includes defence.
[3] Including defence.
[4] Refers to 2009 and includes defence. This includes the public sector as defined by para. 1 of Law no. 2190/1994, ministries, independent authorities, decentralised administrations, local governments of 1st and 2nd degree and supervised public entities of public law, and legal entities of private law of the public sector as well as state-owned enterprises referred to in chapter B of Law no. 3429/2005, which are reported separately. A census was conducted from 2009 to 2013, but data are not available by gender.
[5] A new definition has been adopted. The first value refers to the public sector as defined by para. 1 of Law no. 2190/1994, ministries, independent authorities, decentralised administrations, local governments of 1st and 2nd degree and supervised public entities of public law, and legal entities of private law of the public sector as well as state-owned enterprises (as referred to in chapter B of Law no. 3429/2005), which are reported separately. A census was conducted from 2009 to 2013, but data are not available by gender. The second value refers to the ordinary staff of the core public sector, and includes permanent staff and employees hired under private-law contracts of indefinite duration.
[6] Data refer to 2009. The value refers to the ordinary staff of the core public sector, and includes permanent staff and employees hired under private-law contracts of indefinite duration. These data include defence.
[7] Data include: public administration and public social insurance; public education; and health and social assistance (in the public sector).

4.3. Discussion of the hypothesis of widening the application of the EGF to the general government sector

4.3.1. Gender equality experts in Member States

Gender equality experts in the seven selected Member States have been asked to express their **informed opinion** concerning the application of the **EGF** intervention to the **general government sector**[124]. The reported judgements **do not express a common view** on this crucial issue as the economic and financial situation presents specific peculiarities in each country context. Consequently, a State-by-State report has to be developed.

The hypothesis of a future application of EGF interventions to the general government sector is **not considered relevant for the national context** by the **German experts** since, in

[124] Gender equality experts involved are: Alexandra Scheele in Germany, Antigone Lyberaki in Greece, Elvira Gonzales Gago in Spain, Hanna Sutela in Finland, Mary Murphy in Ireland, Agatha Agowska in Poland, Livia Popescu in Romania.

their experience, the number of employees has not been negatively affected by the financial and economic crisis except for the first year of the crisis (2010). The German Government had already introduced and implemented measures in order to reduce the costs of the general government sector before the outburst of the crisis.

The **Greek expert discourages** the application of the EGF to the general government sector. The EGF **should be devoted to safeguard the suffering private economy.**

The Spanish expert believes that the EGF could **easily be applied** to the general government sector since EGF beneficiaries include those workers made redundant as a consequence of the financial and economic crisis: in fact, the Spanish general government sector has been seriously affected by austerity policies, and 72% of layoffs in this sector have been absorbed by female employees. Moreover, the support to the general government sector **produces positive externalities** that go **far beyond the labour conditions of the employees** since the activities of the general government sector are considered to be 'employment supportive' because they contribute to reconciling work, family, and personal responsibilities.

The **Finnish expert** reports that Finland has been slightly affected by the financial and economic crisis, and that there has been no significant increase in job dismissals. Nonetheless, the situation has changed recently and, given that the regulation does not exclude this possibility, it would be **welcomed** as it would support many women that are going to be made redundant.

The **Irish expert** does not seem to negatively assess the hypothesis of the extension of the EGF to the general government sector. Nonetheless, it has been **pointed out that EU initiatives need to be targeted also at supporting third-sector organisations**, which in Ireland are often funded by the Government, are strongly exposed to financial cuts, and are responsible for a significant portion of public services.

The **Polish expert** as well considers this possibility as a **potential positive action** in order to **trade off** the **impacts of cuts in public spending**. Nonetheless, the expert suggests that some kind of intervention is needed as regards the quality of employment. A closer integration between the EGF and the ESF is also recommended in order to widen the scope of interventions, increase availability, and shorten the application process.

The **Romanian expert** considers that applying EGF interventions to the general government sector would be significantly **useful** in order to **counteract** the **negative impact** of **austerity measures**, which have affected women far more than men in the general government sector. Moreover, this would allow for the possibility to guarantee efficient social services, which are needed more than ever in times of economic and financial crisis.

4.3.2. EU-level social partners

Four EU-level social partners have responded to **the consultation** on the EGF[125]. Their contribution has been **pivotal to understand** the **EGF functioning mechanisms**.

They have been asked to provide information regarding the level of their involvement in the decisions on **the** EGF, as well as their point of view on the possibility to apply the EGF to the general government sector. As to the former, they **all have declared** not to be **much**

[125] Consultations conducted with: Business Europe (on 7 March 2016), ETUC (4 March 2016), CEEP (10 March 2016), Eurochambres (23 February 2016).

involved at **EU level**, but they have agreed that at national and local level their associates are involved. As to the latter, **three provided an answer**: one of them **strongly supports** this option, another one **agrees**, and a third **one** does not believe that **this would be in line** with the scope and the **goals** of the **EGF**.

5. CONCLUSIONS AND RECOMMENDATIONS

5.1. Conclusions

The EGF, which was put in place as a means to mitigate the effects of globalisation, has become a tool to assist Member States in coping with the economic and financial crisis. The effects of the application of the EGF since 2008 were marked by the different waves of the crisis and the diverse situations in Member States. Economic participation for men and women, as measured by the activity rate indicator (15–64 years), has been on the increase since 2008 in most EU-28 Member States: consequently, the drop in the number of jobs mainly translated into **more unemployment** and only in some Member States into **discouragement**. However, the increase in the activity rate since 2008 has mainly been driven by the **rising participation of women and older workers**.

The **quality of work has generally worsened** for men and women but to different degrees, accelerating a process of assimilation between the behaviours of men and women in the labour market, as well as increasing poverty and levelling down gender gaps in employment, wages, and working conditions. The analysis shows that European women suffer from a higher risk of poverty or social exclusion than European men.

Women tend to work in professional sectors – such as education, health, and social work or, more generally, in the public sector – that have been **less directly exposed to the financial and economic crisis** than male-dominated sectors. However, during the second part of the crisis, due to the retrenchment in public expenditure and especially in Member States affected by the sovereign debt crisis, also public employment was impacted.

At EU level, the sectors most affected by the crisis have been the **manufacturing and the construction sectors, which** are typically male-dominated sectors. This is one of the reasons why the EGF has been implemented more often in male-dominated sectors than in female-dominated ones: the share of **women among final beneficiaries is equal to 33 %** in EGF-financed measures.

Other factors emerged from the desk analysis and the consultations conducted with the Managing Authorities at Member States' level and with the Managing Authority at the European Commission as well as with EU level stakeholders. The factors are the following:

- the **size of the** involved in the interventions **firms** since female-dominated sectors mostly consist of small enterprises (even though the selection criteria have been widened in order to promote the access to the EGF),
- the **prevailing productive structure** in different sectors, and
- the differentiated **impact of the crisis** by sectors.

Another relevant factor is **the capacity of Managing Authorities at Member State level to encourage, start, and effectively manage new applications in general, and specifically in a gender-sensitive manner**; this is in turn related to the resources allocated by Member States to the dedicated offices.

All these factors (as the analysis in the seven selected Member States has shown) contribute to an **indirect gender bias effect.** The EGF, in fact, does not produce a direct negative effect on gender equality, which would constitute an infringement of its regulation.

However, the low share of **women among final beneficiaries** as an evaluation result needs to be considered with caution. Data provided on the share of women among beneficiaries are not exhaustive; available data, in fact, represent only less than a half of the EGF implementation cases. This occurs for two reasons: there is a time lag between the end of the implementation phase and the delivery of the final evaluation report for each case; moreover, there are **no formal obligations** on Member States to provide gender-disaggregated data.

Social partners at EU level have been consulted for this study. So far, they do **not consider** the degree of their direct **involvement** in the EGF implementation **completely satisfactory,** whereas they report positive feedbacks from their national associates. A higher involvement of social partners at EU level will allow for the improvement of design, implementation, and evaluation of the whole EGF intervention.

The **gender impact of the EGF** interventions in seven **selected Member States** (Germany, Greece, Finland, Poland, Romania, Ireland, and Spain) has been investigated in two steps: first, a comparison was made between two cases (one from a female-dominated sector and one from a male-dominated sector); second, an in-depth analysis of single significant cases was conducted.

The **comparison of cases in pairs** in each selected Member State has been hindered by the difficulties encountered in identifying examples of EGF interventions concerning a female-dominated sector. In most cases, the **measures implemented** through EGF interventions are the same both in male-dominated sectors and in female-dominated ones, and they concern mainly **vocational training and career counselling**. Some interventions in female-dominated sectors included gender-relevant measures. Implemented measures often tended to **reinforce gender stereotypes**, encouraging women to re-enter the labour market in typically female-dominated sectors (see the two cases considered for Spain) as the choices are driven by job availability; however, the **German** and the **Finnish** cases provide examples of commitment to gender **desegregation**.

The **in-depth analysis of single significant cases** in selected Member States points to interesting common trends: the share of women among actual beneficiaries is higher than among targeted beneficiaries since **women tend to participate more than men in measures**. In the cases in which specific **measures fo**r carers were provided (**gender-relevant measures**), a specific budget was set, and women benefitted the most from them. No other significant difference in the expenditure by gender has been reported at Member State level. Besides, in **none of the cases** analysed, the adopted measures had been designed to **contrast gender segregation** by economic sector. They rather aim at promoting re-employment of dismissed workers by taking into account the labour market situation and personal preferences.

Moreover, the in-depth analysis in each of the highlighted Member States has shown that **tailor-made measures are the most successful. Time flexibility and additional support help to better adjust the measures to beneficiaries** with care responsibilities within the family, who have been usually women. Such measures have proven to be particularly useful in specific contexts of implementation (highly educated women beneficiaries, urban areas, etc.).

5.2. Recommendations

In order to overcome the **lack of gender-disaggregated data** in the evaluations of EGF implementation cases, **Member States** should be **encouraged** by means of an appropriate concrete support, including additional resources, **to implement a more careful data collection** from a gender perspective. In accordance with the Sustainable Development Goals, data collection and analysis are the first step to develop labour market measures that enhance gender equality and women's economic independence. In line with the Europe 2020 strategy and the goals set by the European Commission until 2019, both the ESF and the EGF should contribute to achieving these goals.

Therefore, **awarenes**s should be raised among **national Managing Authorities** on the phenomenon of **gender segregation** in economic sectors.

In any case, **all factors that** have been **identified** as concurring to the **indirect gender bias** (gender segregation by economic sectors, the size of the firms involved in the interventions, the prevailing productive structure in different sectors, and the differentiated impact of the crisis by sectors) have to be **reported** to Managing Authorities in Member States and to the Managing Authority at the European Commission **as critical factors to be monitored and neutralised**.

The **European Commission should encourage Member States** to i**mplement** the EGF even **in sectors** where it has not been implemented so far (for instance, public healthcare, public education, and public social care where needed) also because there is no formal preclusion in the regulations as regards the application of the EGF in the economic sectors like public healthcare, public education, and public social care often belonging to the **government sector**.

More specifically, Managing Authorities at Member State level have to be supported in **encouraging, starting, and effectively managing** new applications in general, **and** specifically in a **gender-sensitive** manner.

In this sense, **incentives and award criteria** for Member States that adopt evidence-based and targeted measures aimed at women's participation in EGF measures could be considered.

Moreover, the European Commission and Member States should be encouraged to **promote** the participation of **social partners** at EU level and in Member States **in design, implementation, and monitoring / evaluation activities** of the EGF with a view to mutual learning, ownership of the measures, and raising awareness on the benefits of gender mainstreaming in the implementation of EGF measures.

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