Research for REGI Committee –
Gender Dimension of the EU Cohesion Policy

Regional Development
Research for REGI Committee - Gender Dimension of the EU Cohesion Policy

Abstract

The study analyses how the gender dimension and the principle of gender equality are taken into account in the EU Cohesion Policy 2014-2020. The aim is to provide inputs for the discussion on how to improve the promotion of gender equality and non-discrimination in the post-2020 programming period.

In detail, the study considers how gender equality has been mainstreamed in ESF and ERDF in the programming, implementation, and monitoring phases with focus on eight selected country case studies. It also provides an assessment of the present and future challenges together with policy indications from relevant stakeholders at both European and national level.
This document was requested by the European Parliament's Committee on Regional Development (REGI).

**AUTHORS**

Istituto per la Ricerca Sociale: Manuela SAMEK LODOVICI (Project manager), Serena Marianna DRUFUCA, Elena FERRARI, Monica PATRIZIO, Flavia PESCE, Eleonora De SILVIS, Cristina MOJA.

CASE STUDIES:
France: Chiara Crepaldi (Istituto per la Ricerca Sociale)
Germany: Bernhard Boockmann (Institute for Applied Economic Research - IAW)
Italy: Flavia Pesce (Istituto per la Ricerca Sociale)
Ireland: Dorota Szelewa (University College Dublin)
Poland: Małgorzata Druciarek and Izabela Przybysz (Institute of Public Affairs, Warsaw)
Romania: Cristina Vasilescu (Istituto per la Ricerca Sociale)
Spain: Ruben Carrandi Cortina (Istituto per la Ricerca Sociale)
Sweden: Malin Hellström Samuelson (Oxford Research, Stockholm)

Research manager: Marek Kołodziejski
Project and publication assistance: Jeanette Bell
Policy Department for Structural and Cohesion Policies, European Parliament

**LINGUISTIC VERSIONS**

Original: EN

**ABOUT THE PUBLISHER**

To contact the Policy Department or to subscribe to updates on our work for the REGI Committee please write to: Poldep-cohesion@ep.europa.eu

Manuscript completed in December 2018
© European Union, 2018

This document is available on the internet in summary with option to download the full text at: http://bit.ly/2D3KNIS


Further information on research for REGI by the Policy Department is available at: https://research4committees.blog/REGI/
Follow us on Twitter: @PolicyREGI

---

**Please use the following reference to cite this study:**


**Please use the following reference for in-text citations:**

Samek Lodovici, Drufuca, Ferrari, Patrizio, Pesce, De Silvis and Moja (2018)

---

**DISCLAIMER**

The opinions expressed in this document are the sole responsibility of the author and do not necessarily represent the official position of the European Parliament.

Reproduction and translation for non-commercial purposes are authorized, provided the source is acknowledged and the publisher is given prior notice and sent a copy.

© Cover image used under licence from Shutterstock.com
# CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>LIST OF ABBREVIATIONS</td>
<td>5</td>
</tr>
<tr>
<td>LIST OF COUNTRIES ABBREVIATIONS</td>
<td>7</td>
</tr>
<tr>
<td>LIST OF BOXES</td>
<td>9</td>
</tr>
<tr>
<td>LIST OF FIGURES</td>
<td>9</td>
</tr>
<tr>
<td>LIST OF TABLES</td>
<td>11</td>
</tr>
<tr>
<td>EXECUTIVE SUMMARY</td>
<td>13</td>
</tr>
<tr>
<td><strong>1. INTRODUCTION</strong></td>
<td>17</td>
</tr>
<tr>
<td>1.1. Aim of the study</td>
<td>17</td>
</tr>
<tr>
<td>1.2. The research approach and activities</td>
<td>17</td>
</tr>
<tr>
<td>1.3. The structure of the study</td>
<td>18</td>
</tr>
<tr>
<td><strong>2. COHESION POLICY AND GENDER EQUALITY: AN OVERVIEW</strong></td>
<td>19</td>
</tr>
<tr>
<td>2.1. Evolution of gender equality in the EU: the EIGE Gender Equality Index</td>
<td>20</td>
</tr>
<tr>
<td>2.2. The EU approach to gender equality</td>
<td>23</td>
</tr>
<tr>
<td>2.3. Cohesion Policy and gender equality</td>
<td>26</td>
</tr>
<tr>
<td>2.4. Overall allocations to gender equality in the 2014-2020 programming period</td>
<td>35</td>
</tr>
<tr>
<td>2.4.1. EU financial allocations for interventions potentially supporting gender equality in the EU and Member States</td>
<td>36</td>
</tr>
<tr>
<td>2.4.2. EU financial allocations directly targeted to gender equality</td>
<td>39</td>
</tr>
<tr>
<td>2.4.3. Projects supporting women’s access to employment</td>
<td>44</td>
</tr>
<tr>
<td><strong>3. COHESION POLICY AND GENDER EQUALITY IN THE CASE STUDIES</strong></td>
<td>47</td>
</tr>
<tr>
<td>3.1. Overview of gender equality in the selected countries</td>
<td>48</td>
</tr>
<tr>
<td>3.2. Cohesion Policy and gender equality in the selected countries</td>
<td>51</td>
</tr>
<tr>
<td>3.2.1. Financial allocations to gender equality in the 2014-2020 programming period in the selected countries</td>
<td>51</td>
</tr>
<tr>
<td>3.2.2. Gender mainstreaming in Partnership Agreements</td>
<td>54</td>
</tr>
<tr>
<td>3.2.3. Attention to gender issues in the selected Operational Programmes</td>
<td>60</td>
</tr>
<tr>
<td>3.2.4. Examples of projects indicated as good practices</td>
<td>79</td>
</tr>
<tr>
<td><strong>4. STRENGTHS AND WEAKNESSES OF COHESION POLICY IN ADDRESSING GENDER EQUALITY ACCORDING TO KEY STAKEHOLDERS</strong></td>
<td>83</td>
</tr>
<tr>
<td>4.1. The perceptions of stakeholders responding to the online survey</td>
<td>84</td>
</tr>
<tr>
<td>4.1.1. Opinions on the 2014-2020 Cohesion Policy as a tool to support gender equality</td>
<td>85</td>
</tr>
<tr>
<td>4.1.2. Opinions on Cohesion Policy implementation strategies and mechanisms along the policy cycle</td>
<td>87</td>
</tr>
</tbody>
</table>
4.1.3. Improving the intervention capacity of post-2020 Cohesion Policy in addressing future challenges for gender equality

4.2. The perceptions of national stakeholders in the selected countries

4.2.1. Main strengths and weaknesses of Cohesion Policy in addressing gender equality according to national stakeholders

4.2.2. Main challenges and proposed solutions according to stakeholders

5. CONCLUSIONS AND RECOMMENDATIONS FOR THE POST-2020 PROGRAMMING PERIOD

5.1. Conclusions and lessons learned

5.2. Future challenges and policy recommendations for the post-2020 programming period

REFERENCES

ANNEXES

ANNEX A

A.1 Additional tables to Chapter 2
A.2 Additional Tables to Chapter 3
A.3 Additional Tables to Chapter 4
A.4 List of stakeholders interviewed in the country case studies
A.5 Web survey questionnaire

ANNEX B Country case studies
# LIST OF ABBREVIATIONS

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Full Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>AFT</td>
<td>French treasury agency (in its French acronym)</td>
</tr>
<tr>
<td>AMFAR</td>
<td>Federation of Rural Women and Families (in its Spanish acronym)</td>
</tr>
<tr>
<td>AMIF</td>
<td>Asylum and Migration Fund</td>
</tr>
<tr>
<td>BMAS</td>
<td>Federal Ministry of Labour and Social Affairs (in its German acronym)</td>
</tr>
<tr>
<td>BMVI</td>
<td>Border Management and Visa Instrument</td>
</tr>
<tr>
<td>CF</td>
<td>Cohesion Fund</td>
</tr>
<tr>
<td>CLLD</td>
<td>Community Led Local Development</td>
</tr>
<tr>
<td>CP</td>
<td>Cohesion Policy</td>
</tr>
<tr>
<td>CPR</td>
<td>Common Provisions Regulation</td>
</tr>
<tr>
<td>EAFRD</td>
<td>European Agricultural Fund for Rural Development</td>
</tr>
<tr>
<td>EC</td>
<td>European Commission</td>
</tr>
<tr>
<td>EEC</td>
<td>European Economic Community</td>
</tr>
<tr>
<td>EESC</td>
<td>European Economic and Social Committee</td>
</tr>
<tr>
<td>EIGE</td>
<td>European Institute for Gender Equality</td>
</tr>
<tr>
<td>EMFF</td>
<td>European Maritime and Fisheries Fund</td>
</tr>
<tr>
<td>EO Bodies</td>
<td>Equal Opportunities bodies</td>
</tr>
<tr>
<td>ERDF</td>
<td>European Regional Development Fund</td>
</tr>
<tr>
<td>ESF</td>
<td>European Social Fund</td>
</tr>
<tr>
<td>ESIF</td>
<td>European Structural and Investment Funds</td>
</tr>
<tr>
<td>ETUC</td>
<td>European Trade Union Confederation</td>
</tr>
<tr>
<td>ETUI</td>
<td>European Trade Union Institute</td>
</tr>
<tr>
<td>EU</td>
<td>European Union</td>
</tr>
<tr>
<td>EUR</td>
<td>Euro</td>
</tr>
<tr>
<td>Abbreviation</td>
<td>Full Description</td>
</tr>
<tr>
<td>--------------</td>
<td>------------------</td>
</tr>
<tr>
<td>FEAD</td>
<td>Fund for European Aid to the most Deprived</td>
</tr>
<tr>
<td>FEMM</td>
<td>European Parliament’s Committee on Women’s Rights and Gender Equality</td>
</tr>
<tr>
<td>FTE</td>
<td>Full-time equivalent employment</td>
</tr>
<tr>
<td>GB</td>
<td>Gender Budgeting</td>
</tr>
<tr>
<td>GE</td>
<td>Gender Equality</td>
</tr>
<tr>
<td>GEI</td>
<td>Gender Equality Index</td>
</tr>
<tr>
<td>GIA</td>
<td>Gender Impact Assessment</td>
</tr>
<tr>
<td>GM</td>
<td>Gender Mainstreaming</td>
</tr>
<tr>
<td>GNI</td>
<td>Gross National Income</td>
</tr>
<tr>
<td>ICT</td>
<td>Information communication technology</td>
</tr>
<tr>
<td>IPs</td>
<td>Investment Priorities</td>
</tr>
<tr>
<td>ISF</td>
<td>Internal Security Fund</td>
</tr>
<tr>
<td>ISG</td>
<td>Institute for Social Research and Social Policy (in its German acronym)</td>
</tr>
<tr>
<td>MAs</td>
<td>Managing Authorities</td>
</tr>
<tr>
<td>NEET</td>
<td>Not in Education, Employment or Training</td>
</tr>
<tr>
<td>NGO</td>
<td>Non-governmental organisation</td>
</tr>
<tr>
<td>NOP</td>
<td>National Operational Programme</td>
</tr>
<tr>
<td>NWCI</td>
<td>National Women’s Council of Ireland</td>
</tr>
<tr>
<td>NWS</td>
<td>National Women Strategy</td>
</tr>
<tr>
<td>OP</td>
<td>Operational Programme</td>
</tr>
<tr>
<td>OP BMW</td>
<td>Operational Programme: Border, Midland and Western</td>
</tr>
<tr>
<td>OP EIL</td>
<td>Operational Programme: Employability, Inclusion and Learning</td>
</tr>
<tr>
<td>OP SE</td>
<td>Operational Programme: Southern and Eastern</td>
</tr>
<tr>
<td>PA</td>
<td>Partnership Agreement</td>
</tr>
</tbody>
</table>
Gender dimension of the EU Cohesion Policy

**PAEM**  Business Support Programme for Women (in its Spanish acronym)

**PON**  National Operational Programme (in its Italian acronym)

**PPS**  Purchasing power standard

**REVES**  European Network of Cities and Regions for the Social Economy

**ROP**  Regional Operational Programme

**SME**  Small and medium-size enterprises

**SOs**  Specific Objectives

**STEM**  Science, technology, engineering and mathematics

**SWOT**  Strengths, Weaknesses, Opportunities, and Threats

**TA**  Technical Assistance

**TEU**  Treaty on European Union

**TO**  Thematic Objective

**UAFSE**  European Social Fund Administrative Unit (in its Spanish acronym)

**WHO**  World Health Organization

**YEI**  Youth Employment Initiative

**LIST OF COUNTRIES ABBREVIATIONS**

**AT**  Austria

**BE**  Belgium

**BG**  Bulgaria

**CY**  Cyprus

**CZ**  Czech Republic

**DE**  Germany

**DK**  Denmark

**EE**  Estonia
<table>
<thead>
<tr>
<th>Code</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>EL</td>
<td>Greece</td>
</tr>
<tr>
<td>ES</td>
<td>Spain</td>
</tr>
<tr>
<td>FI</td>
<td>Finland</td>
</tr>
<tr>
<td>FR</td>
<td>France</td>
</tr>
<tr>
<td>HR</td>
<td>Croatia</td>
</tr>
<tr>
<td>HU</td>
<td>Hungary</td>
</tr>
<tr>
<td>IE</td>
<td>Ireland</td>
</tr>
<tr>
<td>IT</td>
<td>Italy</td>
</tr>
<tr>
<td>LT</td>
<td>Lithuania</td>
</tr>
<tr>
<td>LU</td>
<td>Luxembourg</td>
</tr>
<tr>
<td>LV</td>
<td>Latvija</td>
</tr>
<tr>
<td>MT</td>
<td>Malta</td>
</tr>
<tr>
<td>NL</td>
<td>The Netherlands</td>
</tr>
<tr>
<td>PL</td>
<td>Poland</td>
</tr>
<tr>
<td>PT</td>
<td>Portugal</td>
</tr>
<tr>
<td>RO</td>
<td>Romania</td>
</tr>
<tr>
<td>SE</td>
<td>Sweden</td>
</tr>
<tr>
<td>SI</td>
<td>Slovenia</td>
</tr>
<tr>
<td>SK</td>
<td>Slovakia</td>
</tr>
<tr>
<td>UK</td>
<td>United Kingdom</td>
</tr>
</tbody>
</table>
LIST OF BOXES

Box 1: EIGE’s Gender Equality Index and its domains 21
Box 2: Gender equality in the European Commission proposals for regulations for post-2020 Cohesion Policy (May 2018) 34
Box 3: Context analysis: Examples from France, Germany, Poland, Italy and Romania 55
Box 4: France: the Territories of Excellence for Equality 56
Box 5: Implementation arrangements in the Romanian PA 58
Box 6: Germany and Spain: coordination bodies to support gender mainstreaming in Cohesion policy implementation 58
Box 7: Germany: Regional OP for the ERDF in North Rhine Westphalia 65
Box 8: Ireland: OP EIL 68
Box 9: GE priorities in ERDF programmes: examples from case studies 69
Box 10: Italy: The Gender Territorial Agreements in the Campania ROP 70
Box 11: Spain: Equality Opinion 70
Box 12: Sweden: selected OPs 71
Box 13: Spain: Integrated Sustainable Urban Development Strategies (ERDF Multiregional Spain Operational Programme 2014-2020) 74
Box 14: Poland: Guidelines for the implementation of the principle of equal opportunities and non-discrimination 76
Box 15: Germany: Gender budgeting (2007-2013) 77

LIST OF FIGURES

Figure 1: The Gender Equality Index and its domains in EU28 by MSs, 2005 and 2015 (min-max 0-100) 22
Figure 2: EU allocations 2014-2020 by gender equality relation and by fund, millions of euros 37
Figure 3: EU allocations 2014-2020 by gender equality relation and by fund, % of total allocations by fund 38
Figure 4: EU allocations 2014-2020 directly/indirectly related to gender equality by country, percentage of total allocations 38
Figure 5: EU ESF (including YEI) allocations 2014-2020 directly/indirectly related to gender equality by country, percentage of total ESF+YEI allocations 39
Figure 6: EU allocations 2014-2020 to equality between men and women in all areas (intervention field 105) by fund, millions of euro 40
Figure 7: EU ESF allocations 2014-2020 to the gender equality in all areas (intervention field 105), percentage of overall ESF allocations, by country. 40
Figure 8: EU ESF (including YEI) Allocations 2014-2020 to gender equality secondary theme, millions of euro, and percentage of overall ESF+YEI allocations 41
Figure 30: Assessment of attention to GE in the Implementation of OPs

Figure 31: Assessment of relevance for GE of the monitoring and evaluation systems in OPs

Figure 32: Assessment of relevance for GE of main (expected) outcomes and results for gender equality in the OPs

Figure 33: Number of Project supporting women into employment by Theme - Projects Implemented in 2015-2016 in the selected countries

Figure 34: Percentage distribution for stakeholder’s typology

Figure 35: 2014-2020 Cohesion Policy as a policy tool to support gender equality in the EU and in your country (%)

Figure 36: Consistency of 2014-2020 Cohesion Policy options and envisaged measures with the EU and your country’s main gender equality issues (%)

Figure 37: Achievement of 2014-2020 Cohesion Policy main expected effects towards gender equality in the EU and in your country (%)

Figure 38: Improvement of gender mainstreaming in the 2014-2020 regulatory framework compared to the previous programming period (%)

Figure 39: Usefulness of changes/tools adopted at the EU level in supporting ESF beneficiaries’ participation and activities (scoring 4 and 5), %

Figure 40: Part of the policy cycle in which the gender dimension has been addressed in the current programming period by Cohesion Policy (%)

Figure 41: Tools eventually implemented at national level in order to facilitate the support to gender mainstreaming (% respondents)

Figure 42: Policy cycle phase in which more effort is needed to support gender mainstreaming (% respondents)

Figure 43: Tools considered to be more effective to support gender mainstreaming (% respondents)

Figure 44: Stakeholders interviewed in the case studies

LIST OF TABLES

Table 1: EU allocations 2014-2020 by gender equality relation and by fund, EU amount, millions of euros and percentage of total allocations

Table 2: Overview of the selected OPs in the country case studies
EXECUTIVE SUMMARY

In the programming period 2014-2020 the promotion of gender equality is based on a dual approach. Gender equality is a horizontal principle in all Funds, and directly addressed in one of the European Social Fund (ESF) investment priorities.

This study analyses how the gender dimension and the principle of gender equality are addressed in Cohesion Policy, with focus on the European Regional Development Funds (ERDF) and in the ESF.

Cohesion Policy can have an important role in promoting gender equality. The ESF can support measures directly targeting women and gender equality in employment, social inclusion and education. The ERDF can support measures directly promoting business start-ups and entrepreneurship among women, as well as indirect measures addressing the gender gap in research and innovation, in access to physical, ICT and social infrastructures.

Estimations based on financial data available in the Open Cohesion database show that the overall financial allocations on intervention fields that could potentially affect gender equality, directly or indirectly, represent 55.1% of the total amount. Almost all the ESF measures could affect gender equality (92%), and a significant share of ERDF measures could directly or indirectly affect gender equality (55.3%). The proportion of allocations in measures potentially related to gender equality is particularly high in Northern and Continental European countries. The few available data also show that EUR 5,679 million has been planned for the ESF gender equality cross-cutting objective in 20 MSs out of 28, while only 12 MSs planned allocations in the intervention field directly targeted to ‘gender equality in all areas’, for a total of EUR 1,590 million.

However, the extent to which these allocations are going to support interventions promoting gender equality crucially depends on decisions taken by regions and Member States in their programming and implementation strategies, and on their capacity to implement interventions that take into account the gender dimension.

The eight country case studies and the interviews with Cohesion Policy stakeholders point out that the implementation of gender mainstreaming has been poor, particularly in those ERDF domains not usually perceived as related to women and gender equality.

In the eight selected countries, Partnership Agreements (PAs) address gender equality in the context analysis, although gender equality issues in the policy domains covered by the ERDF are usually not considered. Gender equality is also rarely considered in implementation arrangements. Usually there are no indications on how to ensure the application of the gender equality principle, e.g. in project selection procedures and in monitoring and evaluation systems. However, in some countries ad hoc coordination and support bodies have been created to facilitate the implementation of gender mainstreaming.

Differences in attention to gender equality issues between the programming and the implementation/monitoring phases and between the ESF and ERDF also emerge in the assessment of 28 ESF and ERDF Operational Programmes (OPs) analysed in the country case studies. Attention to gender equality issues is mainly present in the ESF OPs, while in ERDF programmes this is still very limited.

Sweden and Spain show a higher commitment than the other analysed countries at political and operative levels. However, all countries show an improvement in the current programming period.

The national stakeholders interviewed in the case studies point out among the strengths of the current programming period, the focus on gender mainstreaming, and the development of specific
tools and guidelines for its implementation. Among the main weaknesses, the gap between programming and implementation is mentioned the most, followed by the lack of awareness and knowledge on how to implement gender mainstreaming, especially among managing authorities and beneficiaries of ERDF programmes.

The Cohesion Policy stakeholders indicate that the European Structural and Investment (ESI) Funds regulations provide a good legal basis to address gender inequalities, especially in relation to policy areas such as access to the labour market, childcare, work-life balance and non-discrimination. They also point out that attention to gender equality in Cohesion Policy has improved in this programming period.

*Ex ante* gender equality conditionalities and evaluations are considered very important to raise awareness among managing authorities and project promoters, and introduce a gender perspective in the programme implementations.

However, many respondents confirm that a gender equality perspective is lacking in national and regional programmes and, especially in the case of the ERDF, investments have not been prioritised to have a gender equality impact. Almost two-thirds of the respondents state that gender equality was mainly addressed in the programming phase and much less in the project implementation and monitoring phases, especially in ERDF programmes. The limited attention to gender equality issues is reflected in the pessimistic perceptions on the likely achievements of CP in gender equality.

All the interviewed stakeholders highlight the importance of Cohesion Policy funding, regulations and tools in supporting attention to gender equality also for national and regional policies, and underline the need to address some critical points in order to enhance its effectiveness for gender equality:

- the gap between formal statements and implementation;
- the lack of knowledge on how to concretely support gender mainstreaming, especially in the ERDF intervention fields;
- the use of selection criteria, and monitoring and evaluation systems that are only weakly gender-oriented;
- the difficulty in actively involve gender equality bodies and non-governmental organisations in programme design and implementation and to create effective partnerships.

The case studies provide indications of successful mechanisms and good practices adopted in MSs to improve gender mainstreaming in Cohesion Policy, via knowledge sharing, technical assistance, continuous training and awareness-raising. Among those considered most effective are:

- the set-up of a specific governance system for the coordination and monitoring of gender mainstreaming;
- the capacity to ensure a strong commitment to gender equality at the political level and in the Cohesion Policy managing bodies;
- the definition of a national gender equality strategy linking Cohesion Policy strategies and interventions to national measures;
- the adoption of a gender perspective in monitoring systems and in projects’ selection criteria.

As for future challenges, the main concern is the low attention to gender equality in the Commission’s draft proposals for the post-2020 Cohesion Policy, which reflects a downgrading of gender equality in the public debate and policy agenda occurring at EU and national levels. This may result in a less effective Cohesion Policy in supporting regional development and socio-economic growth, as gender
equality is increasingly recognised as a key factor in reducing national and regional economic and social disparities, and for ensuring long-term socio-economic development and inclusion.

To maintain attention to gender equality and overcome the current drawbacks of Cohesion Policy, stakeholders stress the need to provide clear guidelines and support, through:

- the introduction of compulsory requirements for gender equality in all the post-2020 OPs with specific and transversal gender equality measures in all funds, as well as specific obligations (e.g. in selection criteria and monitoring systems), and binding guidelines to enhance compliance;
- maintaining the *ex ante* requirement of developing national gender equality strategies to enhance synergies and improve CP’s effectiveness and added value;
- supporting the creation of effective partnerships with gender equality representatives from civil society;
- developing gender-related tools, guidelines and training programmes tailored to the specific policy domains addressed by CP, with concrete examples of how to implement a gender perspective;
- creating and/or strengthening gender equality coordination, monitoring, and technical assistance bodies to support gender mainstreaming in all policy domains of Cohesion Policy and all programme phases;
- ensuring a strong political commitment to gender equality at European and national/regional level, in order to mainstream the attention and commitment of national and local Cohesion Policy stakeholders.
1. **INTRODUCTION**

1.1. **Aim of the study**

The aim of the present study is to **assess how the gender dimension and the principle of gender equality are taken into account in the EU Cohesion Policy 2014-2020.**

The assessment is meant to provide inputs for the discussion on how to improve the promotion of gender equality and non-discrimination in the post-2020 Cohesion Policy. To this end, it also considers the recently released proposals for the next period regulations.

In detail, the study analyses how gender equality has been mainstreamed in ESF and ERDF programmes, with focus on:

- how gender equality issues were addressed in the programming phase, with attention to:
  - the involvement of gender equality bodies and the social partners, and how the partnership principle has been declined to take into account the gender dimension during the programming phase;
  - how much this issue was considered by the programming bodies;
  - how the experiences from the previous programming period were taken into account;
- how the gender issues are considered and implemented during the implementation phase, with focus on the strategic approach adopted by implementing bodies;
- how the gender issues are taken into account in the monitoring activities, with focus on the adequacy of monitoring procedures in supporting the evaluation of Cohesion Policy in the area of gender equality.

1.2. **The research approach and activities**

The research approach combines **quantitative and qualitative research methodologies** and tools:

- a desk analysis of available literature and policy documents;
- a statistical analysis of available data included in the Open Cohesion database;
- a web survey targeted to main Cohesion Policy stakeholders;
- eight country case studies, involving a desk analysis of national and regional documents and individual interviews with national stakeholders.

The selection of the case studies was based on the following dimensions:

- gender equality and socio-economic conditions;
- Cohesion Policy financial allocations;
- territorial coverage in order to consider Member States belonging to different geographical areas and welfare regimes (Nordic, Anglo-Saxon, Continental, Eastern and Southern Europe).

Based on these criteria, the following eight countries were selected for the country case studies:

- Germany and France as representatives of Continental countries;
- Italy and Spain as representatives of Southern European countries;
- Poland and Romania as representatives of Eastern European countries;
- Ireland as a representative of Anglo-Saxon countries;
- Sweden as a representative of Scandinavian countries.
As shown in the report, these countries well represent the different gender equality conditions and approaches present in the EU28. They also provide a good representation of differences in the approach adopted in Cohesion Policy to support gender equality.

1.3. **The structure of the study**

The report is structured as follows:

**Chapter 2** carries out a brief analysis of the evolution of gender equality in Europe using the Gender Equality Index (GEI) developed by the European Institute for Gender Equality (EIGE). It also provides a description of the evolution of European initiatives and activities to promote gender equality and of how gender equality is treated in Cohesion Policy regulations. Finally, the chapter gives an estimate of the overall financial allocations for Cohesion measures that could directly or indirectly promote gender equality in the 2014-2020 programming period, if a gender perspective is adopted in their design and implementation.

**Chapter 3** is focused on a comparative analysis of how and to what extent Cohesion Funds have addressed gender equality issues in the eight selected countries. The analysis is based on the evidence provided in the country reports.

**Chapter 4** provides an overview of the perceptions of Cohesion Policy stakeholders responding to the online survey and interviewed in the country case studies. This covers the role of the 2014-2020 Cohesion Policy in supporting gender equality with a focus on the main strengths and weaknesses of the approach adopted at EU and national levels.

**Chapter 5** concludes the report providing the main findings and the suggestions for the post-2020 Cohesion Policy emerging from the stakeholders interviewed and the results of the analysis.

Two annexes complete the report: **Annex A** provides additional tables to chapters (Annexes A1 – A3), as well as the list of stakeholders interviewed (Annex A4) and the web survey questionnaire (Annex A5); **Annex B** contains the country case studies.
2. COHESION POLICY AND GENDER EQUALITY: AN OVERVIEW

KEY FINDINGS

There have been improvements in the EU over the last decades on gender equality across many dimensions. However, the available indicators still show large and persistent gender gaps in the labour market, and in the socio-economic and political spheres. Furthermore, as shown in the analysis of the EIGE Gender Equality Index, there are significant variances both across the gender equality domains considered, and across EU Member States. Nordic countries usually present lower gaps compared to Southern and Eastern European countries.

The EU commitment in promoting gender equality has changed over the years. Since the initial approach focusing on equal treatment in employment, the EU has extended its activities in other areas of gender equality. The European Structural and Investment Funds (ESIFs) are an important resource in promoting gender equality and supporting Member States in achieving steady progress towards gender equality.

Regarding Cohesion Policy, the promotion of gender equality is currently a horizontal objective for all funds (gender mainstreaming), and it is directly addressed in one of the ESF investment priorities. However, the implementation of gender mainstreaming in those policy domains not considered to be directly related to women and gender equality, has been limited. In addition, some important tools for decision-making, like the Gender Impact Assessment (GIA) and Gender Budgeting (GB), are still rarely adopted in the EU or national institutions.

The Cohesion Policy framework and regulations on gender mainstreaming are relatively robust. Efforts on gender mainstreaming have focused strongly on policy statements and on procedures and instruments, reflected in the technical guidelines. Yet there are some drawbacks, due to the lack of a specific thematic objective in all the funds dedicated to gender equality with dedicated resources (technical, human and financial). Requirements to integrate gender equality explicitly into all the programme phases are also lacking. Furthermore, the integration of the dual gender equality approach into Operational Programmes is voluntary. There is also a lack of a specific requirement for all funds to have statistics broken down by sex whenever possible or to have gender-relevant indicators, except for the ESF.

Evidence from the evaluations of past programming periods shows that women are among the main beneficiaries of ESIF measures, even if – as is often the case – little attention has been paid to their specific needs in the intervention design, and in defining accessibility conditions. In many cases, the resources actually allocated to gender equality actions have been less than those intended in the programming documents. Failure, or inability to translate intentions into specific priorities of the national or regional Operational Programmes, could be among the reasons.

The financial allocations on intervention fields that could potentially affect gender equality directly or indirectly represent 55.1 % of the total amount of allocations (8.4 % directly related and 46.6 % indirectly related to gender equality). The ESF presents a higher percentage of allocations in measures related to gender equality (92 %); the ERDF also has a significant share of measures that could indirectly affect gender equality (55.3 %). However, the extent to which these allocations finance interventions that indeed support gender equality crucially depends on decisions taken in the implementation of the ESIFs programmes by regions and Member States, and on their capacity to implement interventions that take into account the gender dimension.

The Open Cohesion database contains little data and indicators related to gender equality. According to the data on the ESF Secondary Theme, which classifies ESF and YEI allocations contributing to cross-cutting objectives, EUR 5,679 million has been allocated to objectives related to gender equality (6.1 % of ESF+YEI total allocations) in 20 MSs out of 28. EUR 1,590 million has been allocated under the intervention field Equality between men and women in all areas, including in access to employment, career progression, reconciliation of work and private life and promotion of equal pay for equal work. The largest part is under the ESF funding (EUR 1,579 million), while EUR 11.2 million is under ERDF funding for Territorial Cooperation. Only 12 MSs report allocations specifically related to this intervention field.

In 2015-2016, 5,694 projects dedicated to the sustainable participation and progress of women in employment have been implemented. Out of these, 3,592 projects (63 %) refer to sustainable and quality of employment, 1,249 to social inclusion (22 %) and 851 to educational and vocational training (15 %).
2.1. **Evolution of gender equality in the EU: the EIGE Gender Equality Index**

Besides being a fundamental right in the European Union\(^1\), gender equality is also increasingly recognised as a key factor in reducing national and regional economic and social disparities, and for ensuring long-term socio-economic development and inclusion. The lack of gender equality implies that human resources are not being used to their greatest extent for social and economic development.

Although in the EU there have been improvements in the last decades on gender equality across many dimensions, the available indicators still show large and persistent gender gaps in the labour market and in the socio-economic and political sphere.

A synthetic measure of the complex concept of gender equality is the **Gender Equality Index (GEI)**, a composite indicator published by EIGE\(^2\). The index considers gaps that are to the detriment of either women or men as being equally problematic. It covers six core domains (work, money, knowledge, time, power and health), assigning scores for Member States between 1 for total inequality and 100 for full equality. A short presentation of the domains included in the Gender Equality Index is provided in Box 1.

The Gender Equality Index for the EU28 has improved between 2005 and 2015 from 62 to 66.2 (out of 100 points indicating full equality). However, there are large variances across both the considered gender equality domains and EU Member States. Regarding the gender equality domains, the figure shows that **health** registers the highest score at the EU level (87.4), and in all the EU countries. However, gender gaps are still significant in the other domains. The domains of **work** (71.7) and **time** (71.5) highlight that women's participation in employment remains much lower than the participation of men and there is a persistent gender inequality in allocation of time spent in care and domestic work, and social activities. In the domain of **knowledge**, in 2015 the overall EU score is 63.4, representing the need for greater improvements in promoting gender equality in education and training. Finally, the domain of **power**, assessing gender gaps in decision-making, is the domain with the lowest score on average (48.5), although it has registered the greatest progress out of all domains since 2005.

---

\(^1\) The Charter of Fundamental Rights of the European Union (2000) states the importance of eliminating all types of discrimination, including those based on sex (Article 21) and recognises the right to gender equality in all areas and the necessity of positive action for its promotion (Article 23).

Box 1: EIGE’s Gender Equality Index and its domains

<table>
<thead>
<tr>
<th>Domain</th>
<th>Description</th>
<th>Sub-domains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work (71.7)</td>
<td>Measures the extent to which women and men can benefit from equal access to employment and good working conditions. Sub-domains are:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Participation (79.8) – a combination of two indicators: (1) participation in rates of full-time equivalent (FTE) employment and (2) duration of working life. The FTE employment rate is obtained by comparing each worker’s average number of hours worked with the average numbers of hours worked by a full-time worker.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Gender segregation (64) – measured through the participation of women and men in the sectors of education and quality of work, measured by flexible working time arrangements and job prospects.</td>
<td></td>
</tr>
<tr>
<td>Money (79.6)</td>
<td>Measures gender inequalities in access to financial resources and women’s and men’s economic situation. Sub-domains are:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Financial resources (73.0) – women’s and men’s monthly earnings and income measured through two indicators: (1) mean monthly earnings from work, and (2) mean equivalised net income. Both are expressed in purchasing power standard (PPS).</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Economic situation (86.7) – women’s and men’s risk of poverty and income distribution among women and men measured through two indicators: (1) percentage of population not at risk of poverty and (2) ratio of the bottom and top quintile by sex.</td>
<td></td>
</tr>
<tr>
<td>Knowledge (63.4)</td>
<td>Measures gender inequalities in educational attainment, participation in education and training over the life course and gender segregation. Sub-domains are:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Educational attainment (72.1) – measured by two indicators: (1) percentage of women and men tertiary graduates, and (2) participation of women and men in formal and non-formal education and training over the life course.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Gender segregation in tertiary education (55.6) – measured by the percentage of women and men among students in fields of education, health, welfare, humanities, and arts.</td>
<td></td>
</tr>
<tr>
<td>Time (65.7)</td>
<td>Measures gender inequalities in allocation of time spent on care and domestic work and social activities. Sub-domains are:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Care activities (70.0) – measures gender gaps in involvement of women and men in caring for and educating children, older and disabled people, and involvement in cooking and housework.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Social activities (61.6) – measures the gender gaps in women’s and men’s engagement in social activities (sport, cultural/leisure activities, voluntary and charitable activities).</td>
<td></td>
</tr>
<tr>
<td>Power (48.5)</td>
<td>Measures gender equality in decision-making positions across the political, economic and social spheres. Sub-domains are:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Political power (52.7) – representation of women in national parliaments, government and regional/local assemblies.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Economic decision-making (39.5) – measured by the proportion of women and men in corporate boards of the largest nationally registered companies listed on stock exchanges and national central banks.</td>
<td></td>
</tr>
<tr>
<td>Health (87.4)</td>
<td>Measures gender equality in health-related aspects. Sub-domains are:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Health status (91.2) – differences in life expectancy of women and men together with disability-free life expectancy.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Health behaviour factors (75.4) – WHO recommendations on healthy behaviour.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Access to health services (97.1) – measured by the percentage of people who report unmet medical and/or dental needs.</td>
<td></td>
</tr>
</tbody>
</table>

Source: EIGE

As shown in Figure 1 below, Nordic countries usually present lower gaps compared to Southern and Eastern European countries in all the index domains. For example, Sweden is the country with the highest general score in both 2015 and 2005, besides being among the best three countries in 2015 for all the domains. Conversely, Greece, the country with the lowest general score in 2015, is also at the bottom of the domains distributions, specifically being the second last in work, time and power domains. However, countries like Italy, Cyprus, Portugal or Slovenia are the ones showing the greatest increases from 2005, even though they still remain below the EU average in 2015 (with the exception of Slovenia).

In general, domains’ distributions reflect the same trend of the general index, with Nordic countries at the top and Southern and Eastern European countries at the bottom. Power domain is the one with the lowest average EU score in 2015 (48.5 points), but it is also the domain showing the highest variability among countries and the highest general increases from 2005, even if there are countries showing a decrease from 2005 (Finland at the top of the distribution and Slovakia and Cyprus at the bottom). Health domain, instead, is the one with the highest average EU score in 2015 (87.4 points) and shows little variability within time and within countries. Knowledge and money are the only domains not
having Sweden in the first position, as respectively Denmark and Luxembourg show the highest score in 2015. The work domain reflects the distribution of the general index quite well, having Nordic countries at the top (Sweden, Denmark and the Netherlands) and Southern and Eastern European countries at the bottom (Italy, Greece and Slovakia).

**Figure 1:** The Gender Equality Index and its domains in EU28 by MSs, 2005 and 2015 (min-max 0-100)
2.2. The EU approach to gender equality

The EU commitment in promoting gender equality has changed over the years. Since the initial approach focusing on equal treatment in employment, the European Union has extended its activities in other areas of gender equality.

Besides legislative intervention, since the mid-1990s the European Union has adopted a dual-approach strategy towards gender equality, which encompasses both gender mainstreaming (the integration of a gender perspective into all policies at all stages) and positive actions (specific measures targeted at women, such as policies supporting women’s employment) in tackling gender equality.

---

3 The Treaty of Rome (1957) included in Article 141 EC (formerly Article 119 EEC) equal pay between male and female workers. Several Council directives also referred to gender equality; one example is the First Equal Pay Directive adopted in 1975 (75/117). The Treaty of Maastricht (1993) marks a turning point, introducing new procedures and practices in the field of gender equality extending the adoption of the co-decision procedure on matters involved in Articles 137 and 141 of the EC Treaty.

4 European Commission Communication of 21 February 1996 Incorporating equal opportunities for women and men into all Community policies and activities (COM(96) 67 final). The Treaty of Amsterdam (1997) placed the principle of gender mainstreaming in the EU’s founding text, upgrading it to a ‘fundamental value’ (Art.2 TEU) and objective (Art.3 TEU) of the EU. With the new Lisbon Treaty coming into force amending the Treaty of the European Union (2009), equality between women and men has been upgraded to the status of a ‘fundamental value’ (Art.2 TEU) and objective (Art.3 TEU) of the EU, directly addressing the principle of gender equality as a central element of EU policy.
Gender mainstreaming is based on the recognition that women and men do not have the same resources, needs and preferences and that many structures, systems and policies are not gender neutral, but treat men’s experience as the norm. The adoption of a gender mainstreaming approach involves mobilising all policies and measures, taking into account their possible effects on the respective situation of men and women in all stages of the policy process, ‘so that a gender equality perspective is incorporated in all policies at all levels and at all stages, by the actors normally involved in policymaking’ (CoE, 1998).

Introducing the gender mainstreaming approach marked a significant change from the previous Community action on equal opportunities for men and women, which was based mainly on departmental activities and programmes funded under different specific budget headings. However, as underlined by many experts, the adoption of a gender mainstreaming approach risks producing a sort of ‘gender blindness’, with less attention and investment in specific gender equality measures, such as policies tackling gender gaps or reconciliation policies. The lack of an explicit commitment to gender equality in the Europe 2020 strategy is an example.

In the last decade, the Commission’s commitment to gender equality and gender mainstreaming was strengthened with the Women’s Charter and the Road map for equality between women and men for the period 2006-2010. The road map is at the basis of the five-year Strategy for equality between women and men for the period 2010-2015 adopted in 2010, as well as the European Pact for Gender Equality of 2011 to support the link with Europe 2020.

The 2010-2015 strategy highlights the contribution of gender equality to economic growth and sustainable development, and has been organised into six priority areas:

- equal economic independence,
- equal pay for work of equal value,
- equality in decision-making,
- dignity, integrity and ending gender violence,
- promoting gender equality beyond the EU,
- horizontal issues, including gender mainstreaming.

For each priority area, the strategy identified some key actions to be carried out up to 2015 as well as more than 120 actions to be implemented by different Commission services and the European External Action Service.

According to a 2015 evaluation of the strategy strengths and weaknesses, the strategy provided a valuable framework for gender mainstreaming in the European Commission and for the implementation of a coherent framework for gender equality policies in Member States. It enhanced attention to the gender pay gap, and gender equality in access to innovation, ICT and research. The

---

6 COM(96) 67 final, cited.
strategy also supported an extension of the types of actions and measures implemented, with increasing attention to awareness-raising measures, data gathering, and monitoring and evaluation tools. The involvement of all the European Commission DGs, even if to different degrees, in the programming and implementation of gender mainstreaming in almost all policy areas, was another significant achievement. There was also the establishment of interdepartmental coordination mechanisms – the so-called Inter-Service Group on Gender Equality – and the support for a greater gender balance in the Commission services management positions and committees.

However, the implementation of gender mainstreaming in those policy domains is not considered to be directly related to women, and gender equality has been limited. In addition, some important tools for decision-making, like the Gender Impact Assessment (GIA) and Gender Budgeting (GB), are still rarely adopted in the EU or national institutions.

Gender mainstreaming, even if greatly improved, still remains weakly institutionalised in the EU decision-making process. Gender equality units in the European Commission have limited power to interact on the same level with other decision-making bodies. In addition, the recent tendency to merge all grounds of discrimination, including discrimination based on sex, within the promotion of civil rights and equal treatment for all, risks a downgrade in the profile of gender equality and gender mainstreaming in the policy agenda.

Another major weakness of the strategy was the lack of suitable resources (both human and financial), with no budget earmarked for the gender equality strategy, as well as gender equality in the EU programmes.

These drawbacks can also be found in Strategic engagement for gender equality 2016-2019 published in December 2015 as a continuation of the previous strategy for equality between men and women, providing a reference framework to sustain the 2011-2020 European Pact for Gender Equality with a focus on:

- facilitating the balance between caring and professional responsibilities, and a more equal share of time spent on care and household responsibilities;
- supporting the provision of childcare for 33% of children under 3 and 90% of children between the age of 3 and the mandatory school age;
- supporting the provision of care for other dependents, encouraging women’s entrepreneurship and promoting gender equality in research;
- improving the integration of women migrants into the labour market.

---

12 The Inter-service Group on Equality between Women and Men (in which all Commission departments are represented and which meets at least twice a year). As any other inter-service group, it is a means for information exchange and policy coordination. It monitors the implementation of the Strategic Engagement for Gender Equality (2016-2019) and serves as a forum for exchange of information and best practice in the field of gender equality. It also steers the integration of a gender equality perspective in policy, legal and spending programme activities, including budgetary matters, across all EU policy areas. See: European Commission – DG Justice and Consumers (2015), Strategic engagement for gender equality 2016-2019.

13 For example, environmental policies, transport and competition policies, regional development, macroeconomic policies, and the media and communication policies that may affect women and men differently, as shown by recent developments in socio-economic research.


Gender equality is also a key element of the recently adopted European Pillar of Social Rights\(^\text{16}\), which states equality of treatment and opportunities between women and men must be ensured and fostered in all areas.

The recent Commission proposal for a Work-Life Balance Initiative (2017)\(^\text{17}\) is another important step for gender equality. It is aimed at tackling women’s under-representation in the labour market by modernising the current EU legal and policy frameworks for family-related leave, flexible working arrangements and formal care services, and reducing economic disincentives for second-earners to work.

On the occasion of International Women’s Day on 8 March, every year the Commission presents a report on gender mainstreaming (Report on equality between women and men in the EU), showing the major achievements of the year in EU legislation, actions and funding towards gender equality.

The European Parliament, and particularly the FEMM Committee, is also playing a crucial role in monitoring and supporting the application of gender mainstreaming in all EU policymaking, as well as in the Parliament activities.

Notwithstanding these developments, in recent years and especially since the 2008 crisis, a downgrading of gender equality in the public debate and policy agenda is occurring both at the EU and Member States levels. Research clearly demonstrates that gender equality has suffered during this current period of austerity in many European countries and that commitments to gender equality have been challenged\(^\text{18}\).

### 2.3. Cohesion Policy and gender equality

Cohesion Policy is meant to support economic, social, and territorial cohesion ‘reducing disparities between the various regions and the backwardness of the least-favoured regions’ (1986 Single European Act).

The European Structural Investment (ESI) Funds are the main financial source to tackle regional development. Since the late 1980s, they have also become an important resource in promoting gender equality and supporting Member States in achieving steady progress towards gender equality.

Since 1977, the European Social Fund (ESF) has financed vocational training and employment schemes for women as part of its general policy. In 1988, a specific measure on the promotion of equal opportunities for women and men in the labour market was proposed in the Council Regulation of 1988 under Objective 3 of the ESF. In the programming period 1994-1999, gender equality was a priority objective of the four European Structural Funds\(^\text{19}\) and included a programme (NOW) specifically targeting women. The programming period 2000-2006 saw the introduction of the above-mentioned dual approach in Cohesion Policy. The 2007-2013 programming period further developed the principle of gender mainstreaming at all stages of planning, implementation and evaluation of activities. This was also achieved through Progress, the financial programme created with the aim of supporting on the one hand, effective application of the principle of equality between men and women and on the other, bringing about better integration of the gender dimension in EU policies (employment, inclusion, working conditions, anti-discrimination, etc.). The 2007-2013 regulations


\(^{17}\) COM/2017/0252 final.


\(^{19}\) European Social Fund, European Regional Development Fund, European Agricultural Guidance and Guarantee Fund, Financial Instrument for Fisheries Guidance.
included a number of references to the promotion of gender equality both in the General Regulation\textsuperscript{20} and specifically in ESF\textsuperscript{21}.

In the current \textbf{2014-2020 programming period}, Cohesion Policy funds specifically involve the ERDF, ESF and Cohesion Fund, and with an overall budget of EUR 351.8 billion\textsuperscript{22} this represents the EU’s current main investment policy tool supporting EU economic, social and territorial cohesion. It is also the main investment instrument for supporting the Europe 2020 strategy and constitutes the most important financial support available for the implementation of gender equality policy in the EU.

The importance of Cohesion Policy funding in supporting investments and growth has greatly increased with the crisis, as the ESIFs have been compensating for decreasing national and regional investments. According to the European Commission\textsuperscript{23} in 2014–2016, the commitments from ESIFs are expected to account for approximately 14% of total public investment on average, with the highest share reaching beyond 70% in some Member States.

In the current programming period 2014 – 2020, Cohesion Policy focuses on 11 priorities:

1. strengthening research, technological development and innovation;
2. enhancing access to, and use and quality of ICT;
3. enhancing the competitiveness of SMEs;
4. supporting the shift towards a low-carbon economy in all sectors;
5. promoting climate change adaptation, risk prevention and management;
6. preserving and protecting the environment and promoting resource efficiency;
7. promoting sustainable transport and removing bottlenecks in key network infrastructures;
8. promoting sustainable and quality employment, and supporting labour mobility;
9. promoting social inclusion, combating poverty and any discrimination;
10. investing in education, training and vocational training for skills and lifelong learning;

\textsuperscript{20} Council Regulation (EC) No 1083/2006 of 11 July 2006 laying down general provisions on the European Regional Development Fund, the European Social Fund and the Cohesion Fund and repealing Regulation (EC) No 1260/1999. The General Regulation (Article 16) states that the Member States and the Commission ‘should ensure that equality between men and women and the integration of the gender perspective is promoted during the various stages of implementation of the Funds’ and that ‘the Member States and the Commission shall take appropriate steps to prevent any discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation during the various stages of implementation of the Funds and, in particular, in the access to them’. In addition, Article 11 stresses the importance of the presence of bodies responsible for promoting equality between men and women with reference to the framework of close cooperation (partnership) between the Commission and each Member State.

\textsuperscript{21} In particular: Article 2 of the ESF regulation refers to the promotion of gender equality; Article 3 (Scope of assistance), in defining priorities and actions that can be undertaken, underlines the importance of ‘mainstreaming and specific action to improve access to employment, increase the sustainable participation and progress of women in employment and reduce gender-based segregation in the labour market, including by addressing the root causes, direct and indirect, of gender pay gaps’; Article 4 (Consistency and concentration of support) defines the obligation for all the evaluations undertaken in relation to ESF actions to ‘assess the contribution of the actions supported by the ESF to the implementation of the European Employment Strategy and to the Community objectives in the fields of social inclusion, non-discrimination and equality between women and men, and education and training in the Member State concerned; Article 6 (Gender equality and equal opportunities) calls on Member States to promote in their Operational Programmes gender equality and equal opportunities, declaring that ‘the Member States shall ensure that operational programmes include a description of how gender equality and equal opportunities are promoted in the preparation, implementation, monitoring and evaluation of operational programmes. Member States shall promote a balanced participation of women and men in the management and implementation of operational programmes at local, regional and national levels, as appropriate’. In addition, Article 10 contains an obligation for Member States to report on the implementation of gender mainstreaming and of any gender specific action.

\textsuperscript{22} http://ec.europa.eu/regional_policy/en/funding/available-budget/

11. enhancing the institutional capacity of public authorities and stakeholders, and efficient public administration.

These Thematic Objectives (TOs) are addressed by the Cohesion Policy funds, however to a different extent. While ERDF is mainly targeted to research, innovation, economic development and environmental objectives (TOs 1 to 7), the ESF is focused on employment, education and social inclusion (TOs 8, 9 and 10) and on capacity building (TO 11). The Cohesion Fund, instead, is aimed at Member States whose gross national income (GNI) per inhabitant is less than 90 % of the EU average, and supports mainly transport and environment projects (thus addressing mainly TOs 6 and 7). Member States and regions are also required to invest a significant part of the ERDF (between 50 % and 80 %) in these priority areas, which receive up to EUR 100 billion (close to 30 %) of the ERDF budget. In addition, at least 20 % of the ESF in each Member State will have to be used to support the social inclusion objective.

All these priorities may be addressed in a gender perspective in order to improve gender equality in access to infrastructures and services, and to improve their opportunities in the labour market and the economy, but also in order to enhance the contribution of Cohesion Policy to socio-economic growth. For example, there are gender differences in access to research activities, business creation and credit, and, as underlined by the World Bank24, in access to basic services and infrastructures such as ICT infrastructures and public transport. These gender differences have to be addressed when designing, planning and implementing these measures. Improvements in physical and ICT infrastructures can reduce some significant barriers that reinforce gender inequalities, including:

- women’s lack of free time due to the unequal distribution of caring responsibilities;
- women’s exclusion from economic opportunities at the local level;
- women’s lower presence or absence from well-resourced networks and important decision-making arenas;
- women’s difficult access to services and infrastructures when they are not designed to address the specificities of women’s needs.

Gender equality is addressed in the current Cohesion Policy programming period according to the dual approach, which combines gender mainstreaming in all actions as a horizontal principle with specific measures supporting women’s socio-economic opportunities and empowerment. The promotion of gender equality is a horizontal objective for all funds, and it is directly addressed in one of the ESF investment priorities.

Article 7 of the common Regulation (EU) No 1303/2013 for 2014-2020 provides the legal basis for gender mainstreaming and is reinforced throughout the Common Provisions Regulation (CPR)25 by explicit references to gender equality, non-discrimination and accessibility. According to this principle, Member States and the Commission shall ensure that equality between men and women and the integration of a gender perspective are taken into account and promoted throughout the preparation and implementation of all programmes, including monitoring, reporting and evaluation.

Besides gender mainstreaming, a dedicated investment priority for equality between men and women is envisaged for the ESF (access to employment, career progression, reconciliation of work and

---

private life, and promotion of equal pay for equal work) and specific targeted actions can also be programmed under any other ESF investment priority26.

Within this framework, the 2014-2020 ERDF, ESF and Cohesion Fund are thus meant to provide **funding for enhancing gender equality in all policy areas**, including access to employment, career progression, reconciliation of work and private life, and promotion of equal pay for equal work. Gender equality should also be addressed in actions supporting (access to) infrastructures and research and innovation, entrepreneurship and business development, that are not under a specific gender investment priority but contribute to gender equality in a more indirect way.

In addition to Article 7, the general **Common Provision Regulation (CPR)** for the 2014-2020 programming period includes the following important requirements to support gender mainstreaming in all the phases of the policy cycle27:

- **General ex ante conditionalities** on gender equality requiring the ‘existence of administrative capacity for the implementation and application of the EU gender equality law and policy in the field of ESI funds’. The fulfilment criteria require: ‘arrangements in accordance with the institutional and legal framework of Member States for the involvement of bodies responsible for gender equality throughout the preparation and implementation of programmes, including the provision of advice on gender equality in ESI funds-related activities; and of arrangements for training for staff of the authorities involved in the management and control of the ESI funds in the fields of Union gender equality law and policy as well as on gender mainstreaming28’

- **The ex ante evaluation** shall appraise the adequacy of planned measures to equal opportunities between men and women and to prevent any discrimination, in particular as regards accessibility for persons with disabilities (Article 55(3)(I) CPR).

- **Member States** should include institutions and non-governmental organisations working in gender equality and non-discrimination in **Partnership Agreements (PAs)** and **Monitoring Committees** (Article 5(1)(c) CPR). The **Monitoring Committee** shall examine actions to promote equality between men and women, equal opportunities and non-discrimination including accessibility for persons with disabilities (Article 110(1)(f) CPR, Article 114 of the EMFF). Thus, institutional bodies responsible for gender equality and non-discrimination, and NGOs active in gender equality and non-discrimination should be involved, except in duly justified cases.

- **The managing authority** shall draw up and, once approved, apply **appropriate selection procedures and criteria that are non-discriminatory and transparent, and take into account gender equality and non-discrimination principles**. The managing authority must make sure that the project holder has carried out an analysis of the needs of men and women and/or of the impact of a project on men and women, as well as the needs of groups that suffer from discrimination.


28 The first requirement implies that Member States have to set up a national equality body, elaborate a plan to consult with and involve bodies in charge of the promotion of gender equality, indicating the steps taken to facilitate active involvement of the national equality body. The second implies that Member States set up a plan for training in particular on Union gender equality law and policy as well as on gender mainstreaming, and that the plan covers all staff involved in the implementation of the ESI Funds (managing authorities, intermediate bodies, certifying authorities and audit authorities) at all relevant levels. http://ec.europa.eu/regional_policy/sources/docgener/informat/2014/eac_guidance_esif_part2_en.pdf
The annual implementation reports submitted in 2017, 2019 and by the deadline referred to in CPR Article 138(1) shall specifically assess the implementation of actions to take into account the principles of gender equality, non-discrimination and accessibility (Article 50(4) CPR).

The managing authority shall ensure that the data are broken down by gender whenever possible. However, there is no longer a specific requirement for all funds to have statistics broken down by sex, except for the ESF (see Article 125(2)(e) CPR and Annex 1 of the ESF Regulation). The cited guidelines for EC desk officers underline that ‘where programmes are focusing on “people-related schemes” (training, entrepreneurship measures …), targets should be set, at least in terms of participation of women and groups at risk of discrimination. Where possible and appropriate, these targets should be supplemented by financial targets or even more qualitative targets (in relation to possible gaps identified in women’s employment or groups at risk of discrimination in some specific economic sector for instance).’

In addition, the specific regulations for each fund introduce other requirements that are relevant for gender equality.

Regarding the 2014-2020 ESF, gender equality objectives and a dual gender equality approach are mandatory requirements for the funding period 2014-2020. The ESF regulations:

- directly address the promotion of gender equality in Investment Priority (8iv) equality between men and women in all areas, including access to employment and career development, the reconciliation of work and family life, and the promotion of equal pay for equal work or work of equal value;
- include four investment priorities to address equal opportunities and anti-discrimination priorities for all:
  - (9i) active inclusion, including with a view to promoting equal opportunities and active participation, and improving employability,
  - (9iii) the fight against all forms of discrimination and the promotion of equal opportunities,
  - (9iv) the improvement of the access to affordable, sustainable and quality services, including healthcare and social services of general interest,
  - (10i) reducing and preventing early school-leaving and promoting equal access to good quality early childhood, primary and secondary education including formal, non-formal and informal learning pathways for re-integrating into education and training.

The ESF also contributes to the YEI, the Youth Employment Initiative launched in 2013 to provide targeted support to young people not in education, employment or training (NEETs) in the EU’s regions with a youth unemployment rate in 2012 at above 25 %. The Council Recommendation on Establishing...

---

29 This is a regulatory requirement for the ESF (Annex I of ESF regulation). For the EAFRD, job creation by the LEADER/CLLD approach (as a target indicator) will be split by gender as well as the number of beneficiaries of the measures related to business development and to investment in agricultural holdings (as an output indicator); for the EMFF, the annual data provision on operations (Article 99 of EMFF) should include gender breakdown for the beneficiaries as well for operations, where relevant; for the other funds, the principle of equality mainstreaming should be translated in the monitoring and reporting system.

a Youth Guarantee\textsuperscript{31} requires that ‘gender and diversity of the young people who are being targeted’ be considered in the design of the schemes. The background analysis of the staff working document provides indications of gender differences in entering and remaining in the labour market. Furthermore, the European Youth Report, recently adopted by the Commission, and its staff working paper on the situation of young people in Europe, includes gender-disaggregated information. However, there is no indication on whether and how gender mainstreaming should be applied in the implementation of national measures\textsuperscript{32}.

The 2014-2020 ERDF regulations do not mention specific gender equality objectives and thematic gender aspects explicitly, although they could be addressed in all the ERDF thematic objectives:

- TO1: strengthening research, technological development and innovation. For example, the gender equality principle could be implemented in terms of reduction of gender gaps in research occupations at all stages of research careers and research fields, as well as support to the development of a gender dimension in research and innovation activities and fields.

- TO2: enhancing access to, and use and quality of, ICT. The focus here could be in reducing gender gaps in access to ICT, ICT occupations and use of ICT to develop smart working and the work-life balance.

- TO3: enhancing the competitiveness of SMEs. The gender equality dimension could be supported by promoting female entrepreneurship and management, and reducing gender gaps in company decision-making positions.

- TO4, TO5 and TO6: low carbon emission, climate change and environmental protection. These TOs are the most difficult to implement in a gender equality perspective. However, a gender perspective could be adopted when implementing measures supporting research, companies, awareness-raising and job creation.

- TO7: promoting sustainable transport and removing bottlenecks in key network infrastructures. The gender equality approach could support the design of transport systems and network infrastructures taking into account the different needs and mobility patterns of women and men.

- TO9: promoting social inclusion, combating poverty and any discrimination, by:
  - investing in health and social infrastructure, which contributes to national, regional and local development, reducing inequalities in health status, promoting social inclusion through improved access to social, cultural and recreational services and the transition from institutional to community-based services;
  - providing support for physical, economic and social regeneration of deprived communities in urban and rural areas;
  - providing support for social enterprises;
  - undertaking investment in the context of community-led local development strategies.


As for the **Cohesion Fund**, although some of the funded actions could be addressed in a gender equality perspective (for example regarding accessibility), gender equality is not mentioned in the fund regulation.

The Cohesion Policy framework and regulations on gender mainstreaming are thus relatively robust. Efforts on gender mainstreaming have focused strongly on policy statements and on procedures and instruments, reflected in the technical guidelines.

However, there are some **drawbacks**.

The first is the lack of a **specific thematic objective** in all the funds dedicated to gender equality with dedicated resources (technical, human and financial). Requirements to integrate gender equality explicitly into all the programme planning, implementation, monitoring and evaluation phases are lacking. In the current programming period, gender equality is specifically addressed in only one of the ESF investment priorities supporting employment.

In addition, the **integration of the dual gender equality approach into Operational Programmes is voluntary**, depending on the decisions of Member States and regions.

The **lack of a specific requirement for all funds to have statistics broken down by sex whenever possible or to have gender-relevant indicators**, except for the ESF, is another obstacle to the implementation of a gender perspective at the national and regional levels. It also hinders the assessment of the gender impact of actions supported by the Cohesion Policy, as information on funds allocated to gender equality is difficult to collect (see Section 2.4 below on this).

Evidence emerging from the **evaluations of past programming periods**\(^33\) shows that women are among the main beneficiaries of ESIF measures, even if little attention has been paid to their specific needs in the intervention design, and in defining accessibility conditions. In many cases, the resources allocated to gender equality actions have been less than intended in the programming documents. Failure or inability to translate intentions into specific priorities of the national operational plans could be one of the reasons.

For example, **ERDF measures** supporting female entrepreneurship were often not designed with attention to the specific needs of women entrepreneurs (for example, the need for maternity support, the greater difficulties compared to men in access to credit, the lack of social networks) and this reduced their effectiveness. ERDF support for child and elderly care facilities were instead more effective both in creating jobs for women and in improving women’s work-life balance. Finally, women were often the main beneficiaries of the ERDF interventions in rural or urban regeneration programmes. The **ex post evaluation of the promotion of gender equality in the ERDF and CF 2007-2013**\(^34\) found that these funds promoted equal opportunities in SME support, public transport infrastructure and social infrastructure (childcare facilities). In some cases it also helped in other policies that could potentially promote equal opportunities. Almost all the Member States allocated resources to childcare services. However, the total expenditure has varied greatly across Member States depending on the budget available under the Structural Funds and the current state of the provision of services. The main critical aspect in many cases was the lack of a clear indication of how to intervene,


\(^34\) *Ex post evaluation of the ERDF and CF – Study on the translation of Article 16 of Regulation EC 1083/2006 on the promotion of gender equality, non-discrimination and accessibility for disabled into Cohesion Policy programmes 2007-2013 co-financed by the ERDF and the Cohesion Fund*, Public Policy Institute, Net Effect, Racine, for the European Commission – Info Regio, 2009.
given that attention to gender equality in designing and implementing (social) infrastructure investments is not common. This leads to some difficulties in understanding the added value of the investments, and to the sharing of good practices among the countries.

A very recent study on ERDF support for inclusive growth in the 2014-2020 programming period35 shows similar findings. Gender equality is among the horizontal principles most addressed by the analysed 138 ERDF Operational Programmes (OPs), with 83 OPs explicitly mentioning it. Women are also always mentioned as a target group under all the TOs supporting inclusive growth considered in the study (TOs 1, 2, 8, 9, 10). The survey on MAs conducted in the study also shows that mainstreaming the gender equality principle is considered less difficult to implement compared to the non-discrimination principle. This reflects the fact that this principle is not new and has been addressed in ESIFs programmes for a long time. However, the implementation of the gender equality principle in the ERDF programmes is still perceived as very difficult or difficult by almost a third of respondents; the provision for gender-disaggregated analysis was considered difficult by almost a quarter of respondents. The analysis of the OPs in 16 country case studies36 showed that the main policy fields where the gender equality principle is mainstreamed include gender equality in the labour market and the reduction of gender segregation in occupations and sectors; support to women entrepreneurship and business start-ups; support to the work-life balance with investments in childcare and elderly care facilities. Among the critical aspects underlined by the report, the following are the main ones:

- scarce attention to the implementation of the gender equality principle in ERDF measures supporting social investments, transport systems and environment – a possible explanation is the lack of experience in mainstreaming gender-relevant issues in these interventions;
- still scarce attention to ERDF measures supporting women entrepreneurs and women in research and development;
- wide differences in implementation of the gender equality principle across regional and thematic OPs.

Regarding the ESF, which provides the largest amount of resources and measures for gender equality, results from the evaluation of the 2007-2013 programming period37 show that only 3.7 % of the total ESF resources on average for all Member States was allocated to specific gender equality actions. There is no evidence that gender actions have been mainstreamed. A similar indication results from the evaluation of the 2000-2006 programming period38. In addition, targets related to employment were more likely to be adopted by Member States, while other gender-sensitive objectives (in relation to poverty, care, empowerment, etc.) appear to have been overlooked.

On May 2018, the Commission presented its draft regulation proposals for the 2021-2027 programming period. The main provisions for the gender equality principles are presented in Box 2 below. As underlined by the initial comments of the main stakeholders, these draft proposals show a

---


36 Bulgaria, Croatia, Czech Republic, Estonia, France, Germany, Greece, Hungary, Italy, Latvia, Lithuania, Poland, Portugal, Romania, Slovakia, Spain.


38 Istituto per la Ricerca Sociale (IRS) and CSIL (2009) cit.
downgrading of the gender equality principle compared to the current programming period with the risk that in the post-2020 Cohesion Policy commitment and attention to gender equality will be even lower than in the current one.

Box 2: Gender equality in the European Commission proposals for regulations for post-2020 Cohesion Policy (May 2018)

Proposal for a Common Provision Regulation39 (CPR): the European Commission proposal sets out common provisions for the seven shared management funds (CF, EMFF, ERDF, ESF+, AMIF, BMVI and ISF40). The main stated objectives are: (1) reduce the administrative burden for beneficiaries and managing bodies; (2) increase flexibility to adjust project objectives and resources; and (3) align the programmes more closely with EU priorities and increase their effectiveness.

The proposals reduce the current eleven thematic objectives to five more general policy objectives: (1) a smarter Europe – innovative and smart economic transformation; (2) a greener, low-carbon Europe; (3) a more connected Europe – mobility and regional ICT connectivity; (4) a more social Europe – implementing the European Pillar of Social Rights; (5) Europe closer to citizens – sustainable and integrated development of urban, rural and coastal areas through local initiatives.

Gender equality is mentioned only in Article 6 and Article 67. The first one provides the basis for cooperation with regional and local authorities. It states that partnership shall include among others, also ‘civil society and bodies promoting social inclusion, fundamental rights, gender equality, non-discrimination and rights of people with disabilities’. Article 67 provides that ‘for the selection of operations, the managing authority shall establish and apply criteria and procedures which are non-discriminatory, transparent, ensure gender equality and take into account the Charter of Fundamental Rights of the European Union and the principle of sustainable development and the Union's environmental policy’.

The proposal for the European Social Fund Plus41 (ESF+) promotes the merging of existing funds (ESF, YEI, FEAD, EaSI)42 and the EU Health Programme in order to ensure greater flexibility compared to the current EFS. ESF+ will invest in three main areas: (1) education, training and lifelong learning; (2) effectiveness of labour markets and equal access to quality employment; (3) social inclusion, health and combating poverty. In relation to gender equality, the proposal states that: ‘Member States and Commission should guarantee that ESF+ contributes to promoting gender equality and gender equality of treatment and opportunities in all areas (including participation in the labour market, terms and conditions of employment and career progression)’. ESF+ ‘should also promote the transition from residential/institutional care to family and community-based care, in particular for those who face multiple discrimination, and should not support any action that contributes to segregation or to social exclusion’. In addition, ESF+ should become one of the main building blocks of the ‘investing in people and values’ programme43, so that ‘potential synergies will be developed or strengthened, in particular to promote gender equality and equal opportunities for under-represented groups, and to promote social justice, EU values and respect for fundamental rights’.

Gender equality is not mentioned in the proposal for the ERDF and CF regulations44, although the ERDF ‘shall support the specific objective PO4 – a more social Europe – implementing the European Pillar of Social Rights’, especially by increasing the socio-economic integration of disadvantage groups.

COMMENTS

Most of the opinions expressed until now on the proposed regulations underline the lack of gender equality principles and objectives in CPR and in the ERDF and Cohesion Fund Regulations, and ask for the reintroduction of gender equality as a horizontal principle in the CPR 2021-2027.

40 Cohesion Fund (CF), European Maritime and Fisheries Fund (EMFF), European Regional Development Fund (ERDF), European Social Fund Plus (ESF+), Asylum and Migration Fund (AMIF), Border Management and Visa Instrument (BMVI), Internal Security Fund (ISF).
42 European Social Fund (ESF), the Youth Employment Initiative (YEI), the Fund for European Aid to the Most Deprived (Fead), the Employment and Social Innovation Programme (EaSI).
The European Economic and Social Committee (EESC)\(^{46}\) rejects the removal of the principles of promotion of gender equality, non-discrimination, accessibility of persons with disabilities, as well as sustainable development from the Common Regulation Proposal (CPR). EESC also recommends the reintroduction of Article 7 of the Current CPR in the new CPR (Promotion of equality between men and women and non-discrimination), and the direct incorporation of these principles in the proposed ERDF and Cohesion Fund regulations.

The European Network of Cities and Regions for the Social Economy (REVES)\(^{46}\) also ‘deplores the absence of appropriate anti-discrimination and gender equality strategies and the elimination of these principles as overarching principles’.

The Coalition of European NGOs\(^{47}\) regrets the removal of the equality principle from the European Commission proposal of CPR, underlining that the promotion of gender equality and the fight against discrimination are fundamental principles of the EU and key factors in the 2030 agenda. As the previous bodies, they ask for the reintroduction of gender equality as a horizontal principle to be included in the CPR 2021-2027.

The European Women’s Lobby\(^{48}\) is concerned about the gender neutrality of future proposals for the EU, calling for its reintroduction as a horizontal principle to be included in the CPR 2021-2027.

2.4. Overall allocations to gender equality in the 2014-2020 programming period

In this section, we present the data on EU financial allocations for the ESF, the ERDF and the Cohesion Fund, focusing on allocations targeted to thematic objectives and investment priorities that can have a potential direct or indirect effect on gender equality. Additional tables are provided in Annex A.1.

The analysis is based on the financial allocations data presented in the Open Cohesion database according to specific categorisation codes, which are sometimes not easily associable to gender equality issues, especially for ERDF and CF\(^{39}\).

In order to identify the allocations targeted to interventions that could potentially support gender equality, either directly or indirectly, we have classified the EU data on financial allocations by combining the 123 intervention fields in the Open Cohesion categorisation system and the 11 Thematic Objectives of the ERDF, the ESF and the Cohesion Fund.

Given the data available, Cohesion Policy financial allocations have been classified into the following groups according to their potential direct or indirect gender equality impact\(^{50}\):

(a) Measures with a **high and direct impact on gender equality** because they are explicitly targeted to gender equality, including access to employment, career progression, reconciliation of work and private life, and promotion of equal pay for equal work (intervention field =105);


\(^{49}\) ESIF 2014-2020 - EUR allocation by main categorisation codes by fund. Open Cohesion, Updated: 5 November 2018. https://cohesiondata.ec.europa.eu/2014-2020/ESIF-2014-2020-categorisation-ERDF-ESF-CF-planned/9fpg-67a4. In the programme documents only four dimensions were encoded for ERDF/Cohesion Fund (finance form, intervention field activity, territorial delivery mechanism and territory), while five dimensions were encoded for ESF (the ERDF ones plus ESF secondary themes). The intervention field dimension is the most complete in terms of financial coverage. The total investments under other dimensions may vary for different reasons (e.g. technical assistance priority axes are not encoded in all dimensions). For example ESF total allocations are EUR 84 billion while the ESF secondary theme dimension covers only EUR 55 billion.

\(^{50}\) See Table 5 in Annex A1 for the detailed classification adopted to derive the gender equality relation.
(b) Measures with a **potential medium-high direct impact on gender equality** because although not specifically targeted at women and gender equality, they involve women, i.e. measures targeted at individuals to support active inclusion and employability (intervention field=109), measures to combat all forms of discrimination and promote equal opportunities for all (intervention field=111), and integration into the labour market of young people – in particular NEET, young people at risk of social exclusion and young people from marginalised communities (intervention field=103);

(c) Measures with a potential **high indirect impact** on gender equality. These measures include productive investment, local and sustainable transport, social, early childhood education and care infrastructures, health and education infrastructures, and business development classified under the ESF Thematic Objectives on sustainable and quality employment, and supporting labour mobility (TO8), social inclusion (TO9), and educational and vocational training (TO10).

(d) Measures with a potential **medium and indirect impact** on gender equality. These are interventions supporting productive investment, local and sustainable transport, social, health and education infrastructure, and business development, classified under the ERDF and CF Thematic Objectives.

It is important to underline once more that the analysis considers the financial allocations for measures and intervention fields that could potentially affect gender equality. The extent to which these allocations finance interventions that directly or indirectly support gender equality, crucially depends on decisions taken in the implementation of the ERDF, ESF and Cohesion Fund programmes by regions and Member States, and on their capacity to implement interventions that take into account the gender dimension. This assessment is carried out in Chapter 3 for eight countries representative of the diversity of the EU28 socio-economic and gender equality conditions, and of the different national and regional approaches adopted in the programming and implementation of Cohesion Policy.

### 2.4.1. EU financial allocations for interventions potentially supporting gender equality in the EU and Member States

Table 1, and Figure 2 and Figure 3, report the EU allocations 2014-2020 according to the classification presented above.

Around EUR 29,797 million is directly related to gender equality (i.e. classified in groups a and b), of which EUR 29,576 million (99.3 %) is under ESF (including YEI) and EUR 221 million (0.7 %) is under ERDF.

EUR 165,633 million are instead indirectly related to gender equality (i.e. classified in groups c and d), of which EUR 109,846 million is under ERDF (66.3 %), EUR 55,513 million is under ESF including YEI (33.6 %), and EUR 274 million is under CF (0.2 %).
Figure 2: EU allocations 2014-2020 by gender equality relation and by fund, millions of euros

Overall, according to our classification measures directly or indirectly related to gender equality represent 55.1% of the total amount of allocations (8.4% directly related and 46.6% indirectly related). The ESF presents a higher percentage of allocations in measures related to gender equality (92%) compared to ERDF (55.3%), especially for measures with a direct relation to gender equality (32% vs 0.1%).

Table 1: EU allocations 2014-2020 by gender equality relation and by fund, EU amount, millions of euros and percentage of total allocations

<table>
<thead>
<tr>
<th></th>
<th>CF</th>
<th>ERDF</th>
<th>ESF (+ YEI)</th>
<th>Total EU</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>million €</td>
<td>percentage of total allocations</td>
<td>million €</td>
<td>percentage of total allocations</td>
</tr>
<tr>
<td>Directly related</td>
<td>0.0</td>
<td>0.0</td>
<td>221.1</td>
<td>0.1</td>
</tr>
<tr>
<td>Of which:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>High direct gender equality effects</td>
<td>0.0</td>
<td>0.0</td>
<td>11.2</td>
<td>0.0</td>
</tr>
<tr>
<td>Medium-high potential direct effects</td>
<td>0.0</td>
<td>0.0</td>
<td>209.9</td>
<td>0.1</td>
</tr>
<tr>
<td>Total gender-related</td>
<td>273.9</td>
<td>0.4</td>
<td>109 846</td>
<td>55.1</td>
</tr>
<tr>
<td>High indirectly related</td>
<td>0.0</td>
<td>0.0</td>
<td>18 767.8</td>
<td>9.4</td>
</tr>
<tr>
<td>Total indirectly related</td>
<td>273.9</td>
<td>0.4</td>
<td>91 078.2</td>
<td>45.7</td>
</tr>
<tr>
<td>Total gender-related</td>
<td>273.9</td>
<td>0.4</td>
<td>110 067.1</td>
<td>55.3</td>
</tr>
<tr>
<td>Not gender-related</td>
<td>63</td>
<td>99.6</td>
<td>89 036.1</td>
<td>44.7</td>
</tr>
<tr>
<td>Total EU allocations</td>
<td>63</td>
<td>100.0</td>
<td>199 103.2</td>
<td>100.0</td>
</tr>
</tbody>
</table>

The proportion of allocations in measures related to gender equality is particularly high in Northern and Continental European countries with a percentage ranging from 89 % for Finland to 70 % for France. The Netherlands registers the highest percentage (36 %) in allocations for measures directly related to gender equality, followed by Ireland (32 %), Luxembourg (27 %) and Belgium (25 %).

In particular, in **ESF funding** all EU countries have allocations in measures directly related to gender equality, with percentages ranging from 71 % in NL to less than 15 % in LT, EE, BG and RO. On the
contrary, in ERDF funding allocations on measures directly supporting gender equality have been implemented only in programmes for European Territorial Cooperation.

2.4.2. EU financial allocations directly targeted to gender equality

According to data on the ESI Funds categorisation system 2014-2020⁵¹, about EUR 1,590 million has been allocated under the specific investment field 105 ‘Equality between men and women’ in all areas, including in access to employment, career progression, reconciliation of work and private life and promotion of equal pay for equal work’. Of these allocations, the largest part is under the ESF funding (EUR 1,579 million), while EUR 11.2 million is under ERDF funding for Territorial Cooperation⁵².

Figure 6 shows that only 12 MSs report allocations specifically related to this gender equality investment field. These are: Poland (EUR 441.9 million), Czech Republic (EUR 269 million), Italy (EUR 255.5 million), Greece (EUR 195.8 million), Germany (EUR 149.3 million), Portugal (EUR 80.7 million), Slovakia (EUR 66.5 million), Spain (EUR 49.9 million), Austria (EUR 30 million), United Kingdom (EUR 26.4 million), Finland (EUR 12 million) and Hungary (EUR 1.7 million).

---


⁵² According data on ESIF 2014-2020 Achievement Details (31 October 2018 update) the ‘number of participants in projects promoting gender equality, equal opportunities and social inclusion across borders’ (C45 Common Indicator) is equal to 9,900 participants up to 2016. This is 300 participants in projects for social inclusion in the Interreg V-A - Belgium-Germany-the Netherlands (Euregio Maas-Rijn), 100 in projects for sustainable employment in Interreg V-A - Germany-Austria-Switzerland-Liechtenstein (Alpenrhein-Bodensee-Hochrhein), 2,000 in projects for social inclusion in Interreg V-A - Lithuania-Poland, 7,000 in projects for research and innovation in Interreg V-A - France-United Kingdom (Manche) and 500 in projects for Interreg sustainable employment in V-A - Germany-Denmark.
**Figure 6:** EU allocations 2014-2020 to equality between men and women in all areas (intervention field 105) by fund, millions of euro

![Graph showing EU allocations by fund to gender equality](image)

Source: IRS calculations on Open Cohesion Data, ESIF 2014-2020 categorisation ERDF-ESF-CF (Updated: 5 November 2018).

On average, in these 12 MSs the allocations on the gender equality investment priority represent 2.5 % of the ESF total allocations. MSs reporting the highest incidence of allocations on the gender equality field are the Czech Republic (7.9 % of overall ESF allocations), Austria (6.8 %) and Greece (5 %), while in Spain, the United Kingdom and Hungary the percentage allocated to gender equality is less than 1 %.

**Figure 7:** EU ESF allocations 2014-2020 to gender equality in all areas (intervention field 105), percentage of overall ESF allocations, by country.

![Graph showing percentage of ESF allocations to gender equality by country](image)

Source: IRS calculations on Open Cohesion Data, ESIF 2014-2020 categorisation ERDF-ESF-CF (Updated: 5 November 2018).

In the case of ESF, it is also possible to consider another dimension of the categorisation system – the **ESF Secondary Theme** – in order to capture data on ESF (including YEI) allocations contributing to cross-cutting objectives, including gender equality. According these data, EUR 5,679 million has been allocated to objectives related to gender equality (6.1 % on ESF and YEI total allocations) in 20 MSs out of 28 (Figure 8).
In the ESF, EUR 4,705 million has been invested in objectives related to gender equality (5.6% on ESF total allocations) while the YEI allocations to measures related to gender equality are 973.8 million (11% of YEI total allocations).

Figure 8 shows that the MSs with the highest incidence of allocations to the gender equality ESF secondary theme are: the Netherlands (70.7%, corresponding to EUR 361 million), Slovakia (31.3%, corresponding to EUR 705 million), Spain (18.5%, corresponding to EUR 1,749 million), Poland (11.5%, corresponding to EUR 1,551 million) and Finland (8.9%, corresponding to EUR 46 million).

Figure 8: EU ESF (including YEI) Allocations 2014-2020 to gender equality secondary theme, millions of euro, and percentage of overall ESF+YEI allocations

As shown in Figure 9, allocations to gender equality according to the ESF secondary theme mainly refer to TO8 – sustainable and quality employment (55%, particularly for AT, CZ, ES, HR, IT, LT, SK) and to TO9 – social inclusion (28%, particularly for BE, BG, DE, HU, MT, NL). TO10 – educational and vocational training – is allocated 20% (100% in EE and 65% in FR). In the UK and Greece, most of the allocations to gender equality (respectively 100% and 82%) do not refer to a specific TO but are classified as multi-thematic.

Figure 9: EU ESF (including YEI) allocations 2014-2020 to gender equality secondary theme by thematic objective, percentage distribution
Figures 10, 11 and 12 present the percentage of allocations in measures directly related to gender equality compared with the EIGE Gender Equality Index (GEI 2015). They show the change between 2013 and 2017 in the gender gap for the risk of poverty and the NEET rate, showing a positive correlation, which however does not imply a cause–effect relation.

Countries with higher weights of investment in measures related to gender equality (NL, IE, BE, AT, LU, FR) also present higher values for GEI, and GEI in the employment domain. They also register a reduction in the gender gap in the risk of poverty (NL, AT and FR) and in the NEET rate (NL, BE, AT, LU ad FR).

In the Netherlands, which has invested 36% of allocations in measures directly related to gender equality, GEI is equal to 72.9 compared to 66.2 in the EU28 and it also registers a higher value for the work domain (76.7 vs 71.5). In the 2013-2017 period, the gender gap in risk of poverty decreased by 1.4 pp (from 2 pp to 0.6 pp), a reduction much more significant than in the EU28 average (-0.1 pp). Also, for IE and BE the GEI is higher than the EU average, both for the total (respectively 69.5 and 70.5) and the work domain (respectively 73.9 and 73.8).

Figure 10: Comparison among EU allocations 2014-2020 directly related to gender equality and the Gender Equality Index

Source: Calculation on Open Cohesion Data, ESIF 2014-2020 categorisation ERDF-ESF-CF - planned (5 November 2018 update) and EIGE Gender Equality Index.
**Figure 11:** Comparison among EU allocations 2014-2020 directly related to gender equality and the change in gender gap in risk of poverty

Gender Gap in Risk of poverty (F-M, total population), change 2017/2013

Source: Calculation on Open Cohesion Data, ESIF 2014-2020 categorisation ERDF-ESF-CF – planned (5 November 2018 update) and Eurostat data [ilc_peps01].

**Figure 12:** Comparison among EU allocations 2014-2020 directly related to gender equality and the change in gender gap in NEET rate

Gender gap in NEET rate (F-M, 15-29), change 2017/2013

Source: Calculation on Open Cohesion Data, ESIF 2014-2020 categorisation ERDF-ESF-CF – planned (5 November 2018 update) and Eurostat data [edat_lfse_22].
2.4.3. Projects supporting women’s access to employment

Among the common indicators indicated in the CPR and the ESF and ERDF specific regulations, only the ESF and YEI include gender-disaggregated and gender-relevant indicators.

Among these, the Common Indicator C21 reports the number of projects dedicated to the sustainable participation and progress of women in employment. This indicator is defined as ‘Projects with the aim of increasing the sustainable participation and progress of women in employment, thus combating the feminisation of poverty, reducing gender-based segregation and combating gender stereotypes in the labour market and in education and training, promoting reconciliation of work and personal life for all and equal sharing of care responsibilities between men and women’.

In 2015-2016, according the latest data available (updated at 30 October 2018) presented in Figure 13, 5,694 projects have been implemented at the EU level. A total of 3,592 projects (63 %) refer to sustainability and quality of employment, 1,249 to social inclusion (22 %), 851 to educational and vocational training (15 %) and 2 to efficient public administration.

Most of these projects have been implemented in Germany (3,472), followed by the Czech Republic (666), France (537), Italy (366), Spain (322), Poland (173) and Sweden (40). As shown in Figure 14 below, the composition of the projects by theme shows some differences among MSs.

Figure 13: Projects for women to employment implemented in 2015-2016, by theme and country


---

54 According to the Swedish expert there are two main reasons for the relatively small number of projects supporting women in employment: the first is the adoption of a strong gender mainstreaming approach in Sweden, so that all projects aimed to increase labour participation have to address gender equality. The second is that in Sweden the employment rate of women is already relatively high, so that other projects (still relevant for women, e.g. projects addressing migrants) are prioritised.
Some MSs (e.g. DE, CZ, ES, and PL) implemented projects for female employment mainly referring to sustainable and high quality employment (respectively 66 %, 97 %, 78 % and 84 % compared to 63 %, the EU average), while in FR and IT projects are mainly implemented under the thematic objective of social inclusion (respectively 80 % and 55 % compared to 22 %). In Sweden, a significant number of projects refer to educational and vocational training (38 % vs 15 %).
3. COHESION POLICY AND GENDER EQUALITY IN THE CASE STUDIES

**KEY FINDINGS**

Eight countries were selected for the in-depth analysis of Partnership Agreements and a selection of Operational Programmes by country experts: Germany and France as representative of Continental countries; Italy and Spain as representative of Southern European countries; Poland and Romania as representative of Eastern European less-developed countries, Ireland as representative of Anglo-Saxon countries and Sweden as representative of Scandinavian countries. These countries well represent national differences in the EU28 in gender equality, socio-economic conditions, policy approaches and in Cohesion Policy allocations.

In the eight selected countries, Partnership Agreements show attention to gender equality particularly in the context analysis and in programming. Gender equality is instead less addressed in implementation arrangements, and in the indications for the monitoring and the evaluation systems.

Mostly, PAs include general statements on incorporating a gender perspective in programme implementation, but there are usually no specific indications on how to ensure its application, for example in selection procedures, although in some countries ad hoc guidelines and tools as well as coordination and support bodies have been created to facilitate the implementation of gender mainstreaming.

In most of the case studies, the main issues addressed in the PAs context analysis are those related to gender gaps in the labour market and social inclusion, and to a lesser extent on training and education. Gender gaps and equality issues are instead usually less considered in the policy domains covered by the ERDF and Cohesion Fund. As a consequence, while the general objective of improving human resources and supporting social inclusion is addressed in a gender perspective, this does not happen for the general objectives of improving regional competitiveness and reducing regional disparities.

A number of Operational Programmes (28) have been analysed in depth by the country experts, almost equally divided between national OPs (54 %) and regional OPs (46 %). The majority of the OPs (16) are funded by the ESF/YEI while 11 are funded by the ERDF and 1 is multi-funded.

Attention to gender equality issues is mainly addressed in the ESF OPs, while the ERDF programmes still show a very limited gender perspective in the actions planned and implemented. In addition, the OPs considered also show differences in attention to gender equality issues between the phases of context/programming and implementation/monitoring.

There are differences across countries on how much the gender perspective has been internalised in Cohesion Policy, with Sweden and Spain showing a higher commitment than the other countries considered at both the political and management levels. However, all countries show an improvement in the current programming period compared to previous periods.
3.1. Overview of gender equality in the selected countries

Eight country case studies have been carried out in order to provide factual evidence about how and to what extent the ERDF and the ESF have been addressing gender equality (GE) issues. Where possible, the effectiveness of the measures implemented have been included, according to relevant stakeholders.

The selected countries are representative of the different socio-economic and gender equality conditions in the EU28 Member States, as they have been selected against the following criteria:

- gender equality and socio-economic conditions;
- Cohesion Policy financial allocations by objective (less-developed, transitioning and more-developed regions);
- territorial coverage to consider Member States belonging to different geographical areas and welfare regimes (Nordic, Anglo-Saxon, Continental, Eastern and Southern Europe).

Based on an initial assessment of gender equality conditions and Cohesion Policy allocations, the following eight countries have been selected: Germany and France representing Continental countries; Italy and Spain representing Southern European countries; Poland and Romania representing Eastern European less-developed countries, Ireland representing Anglo-Saxon countries and Sweden as representative of Scandinavian countries.

Based on the EIGE Gender Equality Index55 and its domains (as described in Box 1 in Chapter 2), these countries well represent the different conditions in terms of gender equality in the EU28 (see table below). They are a good representation of national differences in socio-economic conditions, and institutional and welfare systems.

Looking at the overall index (Figure 15), in 2015 – the latest year available – the selected countries are equally divided between those scoring above and those scoring below the EU average of 66.2. Sweden (with an index of 82.6) is the country scoring highest among all MSs. France (72.6), Ireland (69.5) and Spain (68.3) also score above the EU average. Both Germany (65.5) and Italy (62.1) score below the average, while the Eastern European countries occupy the lowest position (Poland at 56.8 and Romania at 52.4).

Considering the domains included in the overall Gender Equality Index (Figure 15) among the eight analysed countries, Sweden shows the highest score in all domains, while Romania is the country with the lowest position in all domains except for work (67.1), where Italy scores less (62.4).

55 https://eige.europa.eu/gender-equality-index
Figure 15: EIGE Gender Equality Index and its domains in 2005 and in 2015 in the selected EU MSs

Source: EIGE
Figure 16 shows the evolution of the gender equality indexes in the considered countries between 2005 and 2015. Compared to 2005, all the selected countries have moved towards greater gender equality.

**Sweden** has remained the most gender equal society – in the EU and among the selected case studies – throughout the 10-year period between 2005 (78.8) and 2015 (82.6). However, the greatest improvements in the overall index have been registered in **Italy** (+12.9 points), rising from 26th position to 14th, although still below the average. **Germany** (65.5), **Poland** (56.8) and **Romania** (52.4) also improved their ranking, although remaining below the EU average. **Ireland** instead moved from an overall score below the EU28 average in 2005 to a score higher than the EU average in 2015.

**France** (72.6) and **Spain** (68.3) also improved their scores, remaining above the EU’s average: the two scores mark an improvement of 7.4 points and 7.6 points respectively.

**Figure 16: Scores of the Gender Equality Index by EU Member State in 2015 and progress over 10 years (2005-2015)**

In all the countries considered, the main driver for improvement in the Gender Equality Index has been in the domain of power (+9.6). In particular, the share of women in decision-making positions has increased significantly in politics, the economy or both, depending on the country. The other dimensions that improved over the 10-year period considered, although to a lesser extent, are money (+5.7), knowledge (+2.6), work and health (+1.5). The time domain decreased on average by -1. The division of time spent on caring and household work has worsened, particularly in Poland, Italy, France and Germany.
3.2. Cohesion Policy and gender equality in the selected countries

This section provides a comparative analysis of the evidence presented in the country reports from the analysis of relevant documents as well as from the interviews with stakeholders.

First, a brief overview of the funds allocated in the selected countries according to their potential for gender equality is provided, in line with the analysis made in Chapter 2.

Second, an assessment is provided on how and to what extent PAs address gender equality issues in the selected countries. PAs are reference documents produced by each Member State in cooperation with the European Commission for programming interventions co-financed by the Structural and Investment Funds. These are linked to the aims of the Europe 2020 growth strategy. For each Member State, the PA defines the strategy and investment priorities chosen by the country. It presents a list of national and regional OPs to be implemented, as well as an indicative annual financial allocation for each OP.

Finally, the gender assessment considers a selection of 28 national and regional Operational Programmes implemented in the selected countries. The analysis focuses on how the gender dimension has been considered in each policy phase of the OPs (programming, implementation, monitoring and evaluation). Attention is given to governance patterns and actors involved, actions selected and implemented, selection and implementation mechanisms, and monitoring and evaluation mechanisms.

Examples of good practices contributing to gender equality in the policy field addressed are also provided. Complete descriptions of the good practices are available in the case studies and in Table 16 in Annex A.2.

3.2.1. Financial allocations to gender equality in the 2014-2020 programming period in the selected countries

As indicated in the previous Chapter 2.4, in Europe, the Cohesion Policy financial allocation that could potentially affect gender equality amounts to 55% of the total. Of this, 46.7% concern actions that could indirectly affect gender equality and 8.4% concerns direct actions.

As shown in Figure 17 below, among the eight considered countries, in six the financial allocations on intervention fields that are likely to affect directly or indirectly gender equality are higher than the EU28 average. In Ireland, most of the funds available are allocated to intervention fields that can affect gender equality (81%), Sweden and Germany follow with 77%. Ireland (32.3%), Sweden (24.3%) and France (19.9%) are the considered countries that have invested most in direct actions towards gender equality. On the contrary, Poland and Romania have allocated a lower share than the EU average on measures with a potential for gender equality: Poland has allocated only 45.5% of its funds on these intervention fields and Romania even less with only 39% of the total on these intervention fields.

---

Turning to allocations on intervention fields directly aimed at gender equality (Intervention Field 105), Poland is the country that has invested most, followed by Italy. However, in France, Romania, Ireland and Sweden there are no allocations to measures specifically related to the promotion of gender equality (Figure 18).

**Figure 17:** EU allocations 2014-2020 directly/indirectly related to gender equality by country, percentage of total allocations


Turning to allocations on intervention fields directly aimed at gender equality (Intervention Field 105), Poland is the country that has invested most, followed by Italy. However, in France, Romania, Ireland and Sweden there are no allocations to measures specifically related to the promotion of gender equality (Figure 18).

**Figure 18:** EU Allocations 2014-2020 to equality between men and women in all areas (Intervention Field 105), million of euros


Considering the ESF Secondary Theme, capturing measures contributing to cross-cutting objectives including gender equality, five Member States among the eight selected report allocations in the Gender Equality cross theme. Spain (18.5 %) and Poland (11.5 %) have an incidence of these allocations on the total ESF and YEI allocations higher than the EU average.
Turning to the composition of these allocations, among the selected countries, Italy and Spain have allocated a higher share than the EU average on thematic objective 8 (73 % and 67 % respectively compared to 50 %), while France has allocated 65 % of its funds to TO10 (compared to 20 %) and Germany 52 % to TO9 (compared to 28 %). Poland shows a more balanced distribution of the funds among the thematic objectives 8, 9 and 10, although the share allocated to TO10 is higher than the EU average (33 % vs 20 %).
3.2.2. Gender mainstreaming in Partnership Agreements

Figure 21 shows the country experts’ qualitative assessment of how gender equality issues have been considered in the different parts of PAs, in the eight selected countries. On average, the context analysis and programming phases (including the selected priorities and the involvement of stakeholders) are those where gender equality is mostly addressed in PAs. The concrete strategy design, and implementation arrangements and procedures show less attention to gender equality issues.

In all the considered countries, the main gender issues addressed in the PAs context analysis are those related to gender gaps in the labour market and social inclusion and, to a lesser extent, on training and education. A gender perspective is instead not usually adopted when addressing the general objectives of improving regional competitiveness and reducing regional disparities in the ERDF policy domains, e.g. research and innovation, SME competitiveness, information technology, sustainable transport and key network infrastructures, and environment and energy.

Figure 21: Assessment of relevance for GE of the presence of gender equality issues in the PAs by phase

<table>
<thead>
<tr>
<th>Phase</th>
<th>High</th>
<th>Medium</th>
<th>Low</th>
</tr>
</thead>
<tbody>
<tr>
<td>Context</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strategy design</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Selected priorities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Involvement of stakeholders</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Envisaged procedures</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Information retrieved from the country case studies. Note: In the envisaged procedure, two assessments were not available. (*) Two experts gave a separate evaluation for the ERDF (low) and the ESF (high).

Regarding implementation arrangements and procedures, the PAs usually include general declarations on incorporating a gender perspective in project selection and monitoring procedures. However, there are often no specific indications on selection procedures to be followed. Finally, almost all the Partnership Agreements foresee a series of measures for the inclusion of a gender perspective in monitoring/evaluation systems.

According to the country experts’ assessments, gender equality is addressed to a great extent in PAs in **Sweden, Spain, Germany and Romania**. In particular, in **Romania** the PA foresees many measures for the promotion of gender equality, although the country performs poorly in terms of gender equality. As shown in the previous section, financial allocations to measures supporting gender equality are lower than the EU average. The delays in programme implementation do not allow an assessment of whether these arrangements are being effectively implemented.

According to the country experts, gender equality is addressed to some extent in **Italy, Poland and France**, although with a few differences. In particular, in Italy the PA does not assess gender equality uniformly across the different steps: it addresses GE to a medium-high extent in the context analysis and in the programming phase. However, in the implementation and evaluation phases this is only done to a medium-low extent. Also in **Ireland**, gender equality is addressed in the PA to a medium-low extent.
Attention to gender equality in the context analysis

As shown in the box below, in most of the case studies the main gender equality issues addressed in the context analysis are those related to: gender gaps in the labour market (TO8), social inclusion (TO9) and, to a lesser extent, training and education. Conversely, gender gaps in access to entrepreneurship, ICT and physical infrastructures have not been considered (see also Table 3 in the Annex A.2). In some cases (e.g. DE, IT, RO, SE), the coverage of GE aspects in the PA’s context analysis has been evaluated as quite extensive. In others (e.g. ES, PL), the country experts judged that gender issues and gender equality were addressed to a lesser extent.

Box 3: Context analysis: Examples from France, Germany, Poland, Italy and Romania

<table>
<thead>
<tr>
<th>Country</th>
<th>Key Issues Related to Gender Equality</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>The labour market is marked by significant inequalities in terms of gender in particular, when considering women entrepreneurs.</td>
</tr>
<tr>
<td></td>
<td>Difficult conditions are faced in particular by young girls, due to a significant gap in the NEET’s share between men and women.</td>
</tr>
<tr>
<td></td>
<td>Concerning education, there is a lack of women in certain scientific disciplines.</td>
</tr>
<tr>
<td></td>
<td>In the area of poverty and social exclusion, those most affected by poverty are, among others, single-parent families whose heads of households are most often women.</td>
</tr>
<tr>
<td>Germany</td>
<td>Among the issues relevant to gender equality the PA considers differences in employment rates and hours of work between men and women, as well as differences in poverty risk and participation in training.</td>
</tr>
<tr>
<td>Poland</td>
<td>The PA identifies problems related to under-representation of women in the labour market and poor access to services. Therefore, the planned interventions focus on improving women’s situation on the labour market and increasing the accessibility of childcare for children up to the age of 3. These two types of action are implemented on both a national and a regional level. In addition, further systemic actions to strengthen institutional gender equality are planned at the national level.</td>
</tr>
<tr>
<td>Italy</td>
<td>The case study emphasises the alignment of the gender approach in Cohesion Policy with the gender needs in the country. For example, the low female employment rates, the under-representation of women in certain economic sectors and in certain fields within education and training systems, and the wide gender gaps in earnings. All these aspects are considered by the PA in its context analysis and women are recognised as a target group to be addressed to overcome Italy’s weaknesses.</td>
</tr>
<tr>
<td>Romania</td>
<td>Sex-disaggregated data are provided regarding the employment and unemployment levels of women, Roma women, disabled women, and young women and those who are NEET. Data on access of mothers to primary healthcare services are also included. Following the gender analysis of the labour market, the partnership agreement also includes women among the target groups of labour market interventions to improve their access to, and level of employment. Data on the level of women victims of domestic violence and human trafficking are also provided as these categories of women are included among the target groups of interventions fighting social exclusion and poverty.</td>
</tr>
</tbody>
</table>

Source: Country case studies.

Attention to gender issues in the PA programming arrangements

The presence of gender equality issues in strategy objectives, and actions and main beneficiaries/target groups

The PA strategies (see Table 4 in Annex A.2) and priorities (see Table 5 in Annex A.2) usually address GE issues explicitly within the general objective of improving human resources by enhancing women’s labour force potential and countering skilled worker shortage through the ESF.

Gender equality issues are instead not considered in the general objectives of improving regional competitiveness and reducing regional disparities (mainly supported by the ERDF). However, some measures may have a direct positive impact on gender equality.
In only a few cases, as in **Sweden**, the Partnership Agreement discusses gender equality as a sustainability aspect and applies it as a horizontal principle of sustainable growth, occupation and competitive power.

In others, such as **Ireland**, the general objectives mentioned in the PA do not directly relate to gender equality issues, but the key interventions cover the most gender-sensitive areas, such as employment and poverty. The indicated objectives set out in the National Women’s Strategy (NWS) refer only to raising employability. The need for more complex measures for enhancing women’s economic and social situation (e.g. raising entrepreneurship, promoting women in decision-making processes, involvement in STEM areas, supporting access to affordable childcare) as well as in public activity (e.g. promoting political activity) are not indicated.

**Involvement of GE stakeholders in the Programming phase and in Monitoring Committees**

**The involvement of gender equality stakeholders in the definition of the PAs has been high or medium for almost all the selected countries.** However, the real involvement in the programming phase differs across countries (Table 6 in Annex A.2).

For example, in **France** the PA states that it is essential from the beginning of the programming period to develop an understanding and ownership of the integrated approach on equality among all actors (managing authorities, intermediary bodies and project promoters). However, among the 356 members of the national partnership only eight directly address gender equality issues. However, France set up an interesting partnership creation mechanism at the local level, called **Territories of Excellence for Equality**, which is described in the box below. It is aimed at the promotion of gender equality in professions and training opportunities.

**Box 4: France: the Territories of Excellence for Equality**

In France, among the initiatives to promote gender equality, the PA mentions the initiative **Territories of Excellence for Equality**, developed during the so-called Social Conferences 2012-2013. These were intended to design a five-year road map in partnership with the social partners and local authorities, involving nine regional councils. This initiative was aimed at supporting gender equality in occupations, particularly in SMEs, the diversity of training and job creation, and the return to employment of women.

**Source:** Country case studies.

In **Germany**, gender equality stakeholders were involved in drawing up the PA at various stages. The Agentur für Gleichstellung im ESF (support structure in the 2007-2013 period) and the Deutsche Frauenrat e.V. (representation of women) as well as other gender equality stakeholders were consulted in workshops. The first stakeholder formulated a ‘Vade mecum for gender mainstreaming’, which served as a guideline for programming, operationalisation and implementation of control mechanisms for gender mainstreaming. The Federal Anti-discrimination Agency was also invited to formulate a statement and the active participation in the Arbeitsgruppe Chancengleichheit (working group on equal opportunities) consisted of ESF and ERDF representatives as well as social partners meeting regularly.

In **Italy**, the PA underlines that the proactive support of national, regional and local equality bodies is the fundamental prerequisite for achieving gender equality objectives. This is especially aimed at regional level and, in particular, in the preparation phases, and in the monitoring and evaluation of interventions. However, it is not specified further how this will be achieved.

In **Romania**, gender equality public bodies (e.g. the unit in charge of gender equality in the Ministry of Labour and Social Justice) were involved in the programming phase. Furthermore, the PA foresees the
creation of an operational working group to ensure the mainstreaming of gender equality in all programme phases. It also foresees the involvement of gender equality bodies (National Agency for Equal Opportunities between Women and Men) in the monitoring committees of all programmes either as a member or observer, as confirmed by interviews with the National Agency for Equal Opportunities between Women and Men.

In Sweden, the partnership agreement was developed by the government together with local, regional and national stakeholders, from the public, private and third sectors. Examples of relevant stakeholders that were invited to consulting meetings are: the Women’s Lobby, Winnet (an NGO working for increased female participation in society development), the Swedish Equality Ombudsman and the Migration Agency.

In Spain, the main body for the promotion of gender equality, the Institute for Women, has been involved in the processes of consultation and reception of indicators. This is in addition to the competent units in the Ministry of Health, Social Services and Equality, the Ministry of Agriculture, Fisheries, Food and Environment, the regional administrations and the local administrations. Likewise, other women’s organisations have been involved, such as the Federation of Rural Women and Families (AMFAR), the Federation of Progressive Women and the Federation of Young Women.

Finally, in Poland, there is no information available on whether gender equality stakeholders took part in the programming phase. The analysis of the monitoring committees’ composition shows there were no such organisations.

**Attention to gender equality in the implementation arrangements foreseen in the PAs**

As indicated by the Italian expert, regarding implementation arrangements, the following measures can be activated in order to support the principle of gender equality in the implementation phase:

- direct actions addressed to women explicitly mentioning how they are to be implemented in order to produce effects on gender equal opportunities;
- selection procedures including the principle of gender equality among key criteria and/or envisaging additional award points to those projects that address gender equality issues among their objectives, actions, and expected effects;
- ad hoc gender equality coordination bodies and mechanisms set up to support gender mainstreaming.

The country case studies (Table 7 in Annex A.2) show that on average, there are general declarations on incorporating a gender perspective in project selection and monitoring procedures, as well as in other stages of implementing the programmes. However, there are often no specific indications on selection procedures.

In Romania, the Partnership Agreement foresees a series of measures for the implementation of gender equality, which are summarised in Box 5. The mainstreaming of gender equality in the project selection phase is particularly relevant for tackling gender equality, also in areas not directly targeted (e.g. social services, health, transport, competitiveness).
Box 5: Implementation arrangements in the Romanian PA

**Romania**: The Partnership Agreement foresees a series of measures for the implementation of gender equality:

(i) distribution of information and publicity to support accessibility for a range of groups through promotion of information on websites, printed materials – also available through meetings, national, regional or local organisations and networks, with particular attention to the rural areas and marginalised communities;
(ii) screening of all projects in the selection phase to avoid funding and implementing any project with adverse or negative consequences for equality between men and women, non-discrimination and accessibility;
(iii) selection of projects comprising specific actions, which have as a principal objective the promotion of equality objectives based on predefined criteria, especially for those funded by ESF;
(iv) development of specific programme indicators for measuring the progress against equality objectives where appropriate;
(v) collecting, recording and storing data breakdown by gender, whenever the nature of the assistance has an impact on the given horizontal themes;
(vi) mainstreaming the equality principle in programme evaluation, either by considering it in the evaluation carried out or by carrying out specific evaluations.

Source: Country case study.

In **Sweden**, selection procedures of projects do take horizontal criteria, such as gender equality (as well as non-discrimination) into consideration when selecting projects. According to the Swedish expert, this is of high relevance as Cohesion Policy is addressing areas with sectors that are still highly gender segregated. However, it is also addressing sectors where it is not always obvious why a gender perspective is important and beneficial (e.g. infrastructure or climate change). Seeing gender equality as something to be integrated and mainstreamed should help further reinforce and understand the gender equality work within these sectors.

In **France**, the MA ESF and YEI produced a guide where it is stated that taking horizontal principles into account is a criterion for choosing projects to be funded\(^57\).

In **Germany and Spain**, specific gender equality bodies and coordination mechanisms were set up to support gender mainstreaming. While in Germany these organisations and mechanism mainly address the ESF OPs, in Spain some initial activities are also addressing some ERDF OPs, as shown in Box 6 below.

**Box 6: Germany and Spain: coordination bodies to support gender mainstreaming in Cohesion Policy implementation**

In **Germany**, the PA provides an anchor for the two main elements contributing to gender equality in the ESF: gender budgeting and the establishment of a support structure for all cross-cutting objectives. The **Agency for Horizontal Objectives** (Agentur für Querschnittsziele) advises and supports the stakeholders implementing the Federal ESF OP to integrate the horizontal objectives gender equality, anti-discrimination and ecological sustainability into their tasks.

**Concrete activities** include various consultancy formats, the organisation of interdepartmental networking of the ESF stakeholders and information management. It also includes the drafting of expert opinions and working materials on the ESF core topics, as well as public relations activities to support the learning processes of the ESF actors. **Target group**: ESF stakeholders, such as managing authorities, other responsible government departments and implementing bodies.

The main **innovative element** is to bring together the expertise of independent gender equality stakeholders, most of them with a background in the social sciences, with the regular operations of the ESF stakeholders. Similar structures exist at regional level, such as in the ESF Baden-Württemberg and ERDF Mecklenburg-Vorpommern.

A key requirement is the availability of competent gender equality stakeholders. These must be knowledgeable, not only on gender issues but also on the ESF, the ERDF and the Cohesion Fund and their policy domains. ESF

stakeholders generally react positively to the offers provided by the support structure. However, stakeholders report that there is a faction of 10 to 15 per cent of stakeholders refusing to cooperate. In Spain, the Network of Equality Policies between Women and Men in the Community Funds is meant to contribute to the integration of gender equality in the European Structural and Investment Funds. The network involves the bodies responsible for GE policies and the management of European Funds of central government, the autonomous communities and cities, and the European Commission. It is co-chaired by the Institute for Women and Equal Opportunities, the ministry responsible for the management of the ERDF and the ESF. The integration in the same network of bodies responsible for managing funds with the organisations that promote gender equality are an innovative approach in managing EU funding. Likewise, the monitoring of the OPs throughout their execution, in a collaborative way and promoting communication between the organisations, has implied an innovation for the funds’ management organisations.

**Main actions:**

- Facilitate the application of EU and national legislation on GE to the actions financed, including the management, control and audit systems.
- Study possible complementary actions on gender equality financed with the funds, and approve the proposals, technical documents and tools that are developed to facilitate the development and effective integration of GE in the interventions of the funds.
- Analyse the contribution of the funds, in their various areas of intervention, to the promotion of GE and examine their different impacts on women and men, assessing their contribution to the improvement and quality of the results obtained.
- Strengthen the role of the equality bodies in the monitoring committees and support them in their tasks.
- Provide guidance and technical support to fund management entities in the implementation of GE.
- Participate in the monitoring committees of the OPs to which the network belongs.
- Cooperate with the evaluation committee in the monitoring and evaluation of the OPs, introducing the gender perspective, as well as collaborating in the thematic evaluations of equal opportunities between women and men that take place in the period.
- Promote exchange and sharing of experiences, good practices and evaluations on the integration of the gender perspective developed in the field of action of the funds.
- Ensure that the communication strategies of the OPs incorporate the gender perspective, guaranteeing, among others, non-discrimination, non-stereotyped images of women and men, and the use of an inclusive and non-sexist language.

**Main target groups:** departments of the public administration engaged in the preparation, monitoring and evaluation of the OPs, as well as intermediate and beneficiary bodies taking part in different processes.

The project is funded by the ERDF and the Institute for Women and Equal Opportunities. Among the main positive effects are increased effectiveness of the implemented policies and facilitation of communication between different agents and departments (fund management on the one hand and promotion of equality on the other). This is the case, for example, of the Operational Programmes financed through ERDF which, as a result of the participation of the network in the actions related to the aforementioned urban strategies, have increased contact with the equality bodies and their sensitivity in relation to gender issues.

Source: Country case study.

**Attention to gender equality issues in monitoring and evaluation arrangements**

In many countries (e.g. PL, FR, RO, ES, IT) the Partnership Agreements foresee a series of measures for the integration of a gender equality perspective in the monitoring and evaluation phases.

In France, the PA states that at least once a year, monitoring committees should be provided with a gender analysis of the programme implementation. Specific indicators are also envisaged, e.g. among the output indicators on participants one is the ‘Number of projects concerning participation and the progress of women in employment’. In addition, in the database *Ma demarche FSE*, project leaders have to specify whether gender equality is taken into account through one or more specific actions or transversally.
In **Italy**, most of the result indicators that are related to people are disaggregated by sex. In TO8, women are explicitly indicated as target groups. Annual implementation reports should also consider if and how the principle of gender equality has been considered within NOPs and ROPs.

In **Poland**, specific evaluations on the application of the GE principle are planned for the years 2019 and 2020. However, interviews with experts indicate that among representatives of the institutions involved in the implementation of Operational Programmes, the understanding of this concept is still very limited and, according to the country experts, often there is a growing political reluctance towards gender equality issues.

In **Romania**, the PA foresees a series of measures for the monitoring and evaluation systems:

- development of specific programme indicators for measuring the progress against equality objectives where appropriate;
- collecting, recording and storing data breakdown by gender, whenever the nature of the assistance has an impact on the given horizontal themes;
- mainstreaming the equality principle in programme evaluation either by considering it in the evaluation carried out or by carrying out specific evaluations.

Finally, in **Spain**, the PA includes actions for the analysis, monitoring and evaluation of the implementation of the principle of equal opportunities between women and men. This includes the participation of the Institute for Women in the Monitoring Committee to advise on gender equality, and the ‘Network of Equality Policies between Women and Men in the Community Funds’ is involved in monitoring and guaranteeing the integration of the principle of equality between women and men.

### 3.2.3. Attention to gender issues in the selected Operational Programmes

Around three of the most relevant OPs for gender equality were selected in each country for an in-depth analysis of the design and implementation mechanisms in order to determine:

- the **main areas of intervention** according to the thematic objective selected in the country, and their expected effects in tackling gender equality;
- how the **gender dimensions have been considered in each policy phase** (programming, implementation, monitoring): actors involved, resources mobilised, the process of elaboration and delivery of products;
- the **critical factors of success**;
- **examples of good practices** (either a project or an approach).

In total, **28 Operational Programmes** have been analysed in depth by the country experts, almost equally divided between national OPs (54 %) and regional OPs (46 %). See Table 2 for an overview of their main features.
Figure 22: Number of selected national and regional OPs

<table>
<thead>
<tr>
<th>Country</th>
<th>National</th>
<th>Regional/Interregional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sweden</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Spain</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Romania</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Poland</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Italy</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Ireland</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Germany</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>France</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

Source: Information retrieved from the country case studies.

The majority of the OPs (16) are funded by the ESF/YEI while 11 OPs are funded by the ERDF, and 1 is multi-funded.

Figure 23: Number of OPs by fund

<table>
<thead>
<tr>
<th>Country</th>
<th>ESF+YEI</th>
<th>ERDF</th>
<th>Multifunds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sweden</td>
<td>1</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Spain</td>
<td>3</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Romania</td>
<td>2</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Poland</td>
<td>1</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Ireland</td>
<td>4</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Germany</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>France</td>
<td>2</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

Source: Information retrieved from the country case studies.

In France, among the 70 national, interregional and regional programmes, the case study concentrates on the analysis of two national OPs (inclusion and youth employment) and one regional multifund ERDF-ESF OP (Aquitaine). The two national OPs are the main national OPs having an expected high impact on gender equality, and the regional OP is one of the regional OPs with the highest investments in gender equality.

In Germany, there is a large number of regional OPs due to the federal structure of the country. The country expert selected one federal OP (Federal OP for the ESF) and three regional OPs (Regional OP for the ESF in Baden-Württemberg, Regional OP for the ERDF in Mecklenburg-Vorpommern and Regional OP for the ERDF in North Rhine Westphalia). The criteria for the selection were first, the importance and size of the OP, and second, the importance of gender equality in the OP and the potential for good practices. Therefore, the selected OPs are not typical or representative examples, but are relatively advanced with respect to GE, providing examples of good practices in this respect. The stakeholders interviewed for this study underlined the strategic importance of these OPs for gender equality.
Cohesion Policy in **Ireland** encompasses three OPs, and all have been analysed in the country case study. One is a national OP on employability, inclusion and learning (OP EIL), and two are regional OPs, the Border, Midland and Western OP (BMW), and the Southern and Eastern OP (SE).

Cohesion Policy in **Italy** is delivered by a combination of 51 national and regional monofund and multifund OPs, including 12 national programmes co-financed by ERDF and/or ESF, and 39 regional programmes. Following the recommendations of the stakeholders interviewed about the most relevant OPs in terms of gender equality in Italy, four ESF Regional OPs have been selected and assessed: Campania ROP, Piedmont ROP, Sardinia ROP and Tuscany ROP.

In the **Polish** case study, the following OPs have been selected for analysis: National Operational Programme Knowledge Education Development 2014-2020 (EFS, YEI); Operational Programme Digital Poland for 2014-2020 (ERDF); Operational Programme Development of Eastern Poland (ERDF); and Operational Programme Smart Growth 2014-2020 (ERDF). Apart from the NOP knowledge education development 2014-2020, which is the only national OP directly addressing inequalities between women and men, the remaining programmes have been selected as examples of an unused potential for gender equality. These are programmes where a more complex approach – from a gender perspective – could have been adopted, whereas the gender equality horizontal principle has been selected as the only tool for counteracting gender inequalities.

In **Spain**, there are 23 ESF OPs (one for each of the nineteen regions plus four national programmes) and 21 ERDF OPs (nineteen regional programmes and two national programmes). Among them, four OPs were selected following the recommendations of the stakeholders interviewed about the most relevant OPs in terms of gender equality in Spain:

- three ESF OPs: employment, training and education, social inclusion and the social economy, and youth employment;
- one ERDF OP: Plurirregional Spain.

In **Sweden**, three of the ten Operational Programmes have been chosen addressing thematic areas that have the highest potential impact on gender equality. These are the national ESF Operational Programme, the national ERDF Operational Programme and the ERDF Operational Programme for Upper Norrland.

Overall, the OPs assessment by country experts points out the differences in attention to gender equality between the ESF and ERDF OPs, and the differences between the context/programming phases and the implementation/monitoring ones already mentioned.
Table 2: Overview of the selected OPs in the country case studies

<table>
<thead>
<tr>
<th>Country</th>
<th>Operational programmes</th>
<th>Funds</th>
<th>Managing body</th>
<th>Thematic objectives addressed in the OPs</th>
<th>EC contribution (€)</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>Employment and Social Inclusion (national)</td>
<td>ESF, ESF/YEI</td>
<td>Délégué général à l’emploi et à la formation professionnelle</td>
<td>8, 9, 10, TA</td>
<td>2,820,495,562</td>
</tr>
<tr>
<td></td>
<td>Youth Employment (national)</td>
<td></td>
<td>Délégué général à l’emploi et à la formation professionnelle</td>
<td>8, TA</td>
<td>660,177,791</td>
</tr>
<tr>
<td></td>
<td>Aquitaine – ERDF/ESF/YEI (regional)</td>
<td>ERDF/ESF/YEI</td>
<td>Regional Council of Aquitaine</td>
<td>1, 2, 3, 4, 5, 6, 8, 9, 10, TA</td>
<td>459,274,123</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>(ERDF: 368,699,392) (ESF/YEI: 90,574,731)</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>Federal OP for the ESF (national)</td>
<td>ESF</td>
<td>Bundesministreium für Arbeit und Soziales (BMAS)</td>
<td>8, 9, 10</td>
<td>2,689,319,893</td>
</tr>
<tr>
<td></td>
<td>Regional OP for the ESF in Baden-Württemberg (regional)</td>
<td>ESF</td>
<td>Ministerium für Soziales und Integration Baden-Württemberg</td>
<td>8, 9, 10</td>
<td>260,000,000</td>
</tr>
<tr>
<td></td>
<td>Regional OP for the ERDF in Mecklenburg-Vorpommern (regional)</td>
<td>ERDF</td>
<td>Ministerium für Wirtschaft, Arbeit und Gesundheit</td>
<td>1, 3, 4, 6, 9</td>
<td>968,000,000</td>
</tr>
<tr>
<td></td>
<td>Regional OP for the ERDF in North Rhine Westphalia (regional)</td>
<td>ERDF</td>
<td>Ministerium für Wirtschaft, Energie, Industrie, Mittelstand und Handwerk</td>
<td>1, 3, 4, 6, 9</td>
<td>1,210,000,000</td>
</tr>
<tr>
<td>Ireland</td>
<td>Programme for Employability, Inclusion and Learning (national)</td>
<td>ESF/YEI</td>
<td>Department of Education and Skills (Ministerial level)</td>
<td>8, 9, 10</td>
<td>612,661,245</td>
</tr>
<tr>
<td></td>
<td>Regional OP Border, Midland and Western (BMW)</td>
<td>ERDF</td>
<td>Northern and Western Regional Assembly</td>
<td>1, 2, 3, 4, 6</td>
<td>160,708,921</td>
</tr>
<tr>
<td></td>
<td>Regional OP Southern and Eastern (SE)</td>
<td>ERDF</td>
<td>Southern Regional Assembly</td>
<td>1, 2, 3, 4, 6</td>
<td>250,066,177</td>
</tr>
<tr>
<td>Italy</td>
<td>Regional OP Campania (regional)</td>
<td>ESF</td>
<td>Campania Region</td>
<td>TA, 10, 11, 8, 9</td>
<td>627,882,260.00</td>
</tr>
<tr>
<td></td>
<td>Regional OP Piedmont (regional)</td>
<td>ESF</td>
<td>Piedmont Region</td>
<td>TA, 10, 11, 8, 9</td>
<td>436,145,000.00</td>
</tr>
<tr>
<td></td>
<td>Regional OP Sardinia (regional)</td>
<td>ESF</td>
<td>Sardinia Region</td>
<td>TA, 10, 11, 8, 9</td>
<td>222,400,000.00</td>
</tr>
<tr>
<td></td>
<td>Regional OP Tuscany (regional)</td>
<td>ESF</td>
<td>Tuscany Region</td>
<td>TA, 10, 11, 8, 9</td>
<td>366,481,608.00</td>
</tr>
<tr>
<td>Poland</td>
<td>Operational Programme Knowledge Education Development 2014-2020 (national)</td>
<td>EFS/YEI</td>
<td>Ministry of Investment and Economic Development</td>
<td>4,652,000,000</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Operational Programme Digital Poland for 2014-2020 (national)</td>
<td>ERDF</td>
<td>Ministry of Investment and Economic Development</td>
<td>2, TA</td>
<td>2,172,494,670</td>
</tr>
<tr>
<td></td>
<td>Smart Growth Operational Programme 2014-2020 (national)</td>
<td>ERDF</td>
<td>Ministry of Investment and Economic Development</td>
<td>1, 3, TA</td>
<td>8,613,929,014</td>
</tr>
<tr>
<td></td>
<td>Operational Programme Development of Eastern Poland 2014-2020 (regional)</td>
<td>ERDF</td>
<td>Ministry of Investment and Economic Development</td>
<td>3, 4, 7, TA</td>
<td>2,000,000,000</td>
</tr>
<tr>
<td>Romania</td>
<td>Human Capital Programme – ESF (national)</td>
<td>ESF</td>
<td>Ministry of European Funds</td>
<td>8, 9, 10</td>
<td>4,326,838,744</td>
</tr>
<tr>
<td></td>
<td>Regional Operational Programme – ERDF (national)</td>
<td>ERDF</td>
<td>Ministry of Regional Development and Public Administration</td>
<td>1, 3, 4, 6, 7, 9, 10, 11</td>
<td>6,600,000,000</td>
</tr>
<tr>
<td></td>
<td>Administrative Capacity Programme</td>
<td>ESF</td>
<td>Ministry of Regional Development and Public Administration</td>
<td>11</td>
<td>553,191,489</td>
</tr>
<tr>
<td>Country</td>
<td>Operational programmes</td>
<td>Funds</td>
<td>Managing body</td>
<td>Thematic objectives addressed in the OPs</td>
<td>EC contribution (€)</td>
</tr>
<tr>
<td>---------</td>
<td>------------------------</td>
<td>-------</td>
<td>---------------</td>
<td>----------------------------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>Spain</td>
<td>Plurirregional Spain ERDF 2014-20 OP</td>
<td>ERDF</td>
<td>Ministry of the General Subdirectorate for ERDF Administration</td>
<td>1, 2, 3, 4, 6, 7, 9, TA</td>
<td>10,004,336,884</td>
</tr>
<tr>
<td></td>
<td>Youth Employment ESF 2014-2020 OP (national)</td>
<td>ESF / YEI</td>
<td>Ministry of Labour, Migrations and Social Security – ESF Management Unit (UAFSE)</td>
<td>8, TA</td>
<td>6,928,747,590</td>
</tr>
<tr>
<td></td>
<td>Social Inclusion and the Social Economy ESF 2014-2020 OP (national)</td>
<td>ESF</td>
<td>Ministry of Labour, Migrations and Social Security – ESF Management Unit (UAFSE)</td>
<td>8, 9, TA</td>
<td>800,050,000</td>
</tr>
<tr>
<td></td>
<td>Employment, Training and Education ESF 2014-2020 OP (national)</td>
<td>ESF</td>
<td>Ministry of Labour, Migrations and Social Security – ESF Management Unit (UAFSE)</td>
<td>8, 9, 10, TA</td>
<td>2,115,030,502</td>
</tr>
<tr>
<td>Sweden</td>
<td>National OP: The national social fund programme (nationella socialfondsprogrammet)</td>
<td>ESF</td>
<td>Responsible ministry: The Swedish Ministry of Employment Managing Authority: The ESF Council (Rådet för Europeiska socialfonden, ESF-rådet)</td>
<td>8, 9, 10</td>
<td>780,000,000</td>
</tr>
<tr>
<td></td>
<td>National OP: The National European Regional Development Fund programme (nationella regionalfondsprogrammet)</td>
<td>ERDF</td>
<td>Managing authority: The Swedish Agency for Economic and Regional Growth</td>
<td>1, 3, 4</td>
<td>136,300,000</td>
</tr>
<tr>
<td></td>
<td>Regional OP: Upper Norrland (Övre Norrland), Areas concerned: counties of Västerbotten and Norbotten</td>
<td>ERDF</td>
<td>Responsible ministry: The Swedish Ministry of Enterprise and Innovation Managing authority: The Swedish Agency for Economic and Regional Growth</td>
<td>1, 2, 3, 4, 7</td>
<td>212,000,000</td>
</tr>
</tbody>
</table>

Source: Country case studies.

**Presence of gender equality issues in the OPs context analysis**

As shown in the following figure, an expected and clear difference emerges among the ESF and the ERDF OPs concerning the presence of gender equality issues in the context analysis of OPs.

**Figure 24: Assessment of relevance for GE of the presence of gender equality issues in the context analysis of OPs**

![Figure 24](image)

Source: Country case studies.
The ESF OPs are more likely than the ERDF OPs to address gender issues and gender equality. The main issues addressed are (see also Table 8 in Annex A.2):

- gender gaps in employment and discrimination of women on the labour market;
- the lack of institutional care for children;
- low participation of women in decision-making in the economy, which results from non-transparent recruitment;
- lack of cooperation between different stakeholders to strengthen the gender equality policy.

Also, gender-disaggregated data are often provided.

Conversely, often no specific attention to GE issues is present in the context analysis of the ERDF OPs, unless horizontal principles are taken into consideration in discussing the country/region specific context.

Germany and Sweden are exceptions. In **Germany**, all of the OPs considered – including the ERDF – address gender equality with an extensive treatment in the socio-economic analysis (see Box 7). In **Sweden**, gender equality is addressed in relation to the general objectives and is integrated in all parts of the OP. Gender equality is to be implemented as a tool to help projects to achieve their specific objectives and is seen as a driver for sustainable growth, and as a way to create a fairer and more democratic society.

In **Italy**, where only ESF OPs have been analysed, gender-related issues are treated in the context analysis but women are usually considered as a ‘weak’ target group to be ‘protected’ and not as a main asset to improve the country’s economic prospects. Together with the specific aim of increasing female employment rates, emphasis is also placed on reconciliation issues, regarded as a crucial element for achieving gender equality.

**Box 7: Germany: Regional OP for the ERDF in North Rhine Westphalia**

The SWOT analysis carried out in the OP context analysis underlines that:

- Women in employment are missing across all economic sectors and this is considered a waste of valuable skills for the economy. A change in corporate culture is thus envisaged. Enterprises, especially SMEs, must become more open to the needs of their female employees. They need to open up recognisable career opportunities. This includes the implementation of a family-friendly personnel policy supporting a better reconciliation of work and family life.
- Women are also under-represented in sustainable sectors such as engineering and ICT technologies. As a result, they are less involved in innovation and technological development. Women should therefore be promoted and involved in innovation processes.

Source: Country case studies.

**Presence of gender equality issues in the OP programming phase**

**Presence of gender equality issues in strategy objectives and actions, and main beneficiaries/target groups in the OPs**

The general objectives mentioned in the OPs address the reduction of gender gaps and improvement of gender equality in the country/region to a medium-high extent in the case of ESF. The assessment is on average lower when considering ERDF programmes (Figure 25).
Figure 25: Relevance for GE of the presence of gender equality issues in strategy design in OPs

Source: Country case studies.

For example, in Germany, all of the OPs follow the double strategy based on specific actions as well as mainstreaming gender issues as a cross-sectional dimension in all actions. Strategic objectives are mentioned with regard to gender equality. In all the considered OPs, there are specific objectives for gender equality in the investment priorities. This is also the case in Romania, where gender equality is included both in ESF and ERDF programmes both as a horizontal principle and through measures directly targeted to women (i.e. direct contribution to gender equality) or relevant for improving women’s contribution (i.e. indirect contribution to gender equality).

In Ireland, in the ESF OP the objectives relate to areas where gender issues have been at least briefly covered, although there is no explicit reference to equal opportunities between men and women.

In Italy, gender equality is considered in the strategy design parallel to the context analysis. In two OPs (Campania and Sardinia), women are included in other specific objectives, besides the one directly aimed at increasing female employability.

In Poland, according to the interviewed stakeholders, general objectives relate to gender equality only to a low extent in the ERDF OPs, where the perspective has been included only as a horizontal principle.

In Spain, all the OPs include lines of action that may have a positive impact on gender equality. For example, in the ESF/YEI OP Youth Employment, although no IPs are specifically focused on gender equality, specific mechanisms are provided to determine possible gender gaps.

Also, in the Swedish Operational Programmes (most of which were developed by consulting gender equality stakeholders to some extent), gender equality is treated as a horizontal principle to be considered in all stages of the project process: during the selection, design, implementation, monitoring and evaluation periods. More specific information is provided in Table 9 in Annex A.2.

Further differences between the ESF and ERDF OPs emerge when considering to what extent the TOs and IPs mentioned in the OPs relate to the reduction of gender gaps in the country/region, and target groups involved.
The TOs and IPs in the ESF programmes relate to GE to a large extent, as gender equality is incorporated in almost all TOs and IPs. Many of the expected results refer especially to women.

For example (Table 10 Annex A.2), in the German Federal ESF OP concrete GE objectives are defined:

- increasing women’s living and working lives;
- improving women economic independence;
- reconciling work and private life;
- promoting the entrepreneurial spirit of women;
- eliminating gender stereotypes in career choice;
- increasing the proportion of women in dual vocational training;
- increasing the share of women as professionals and managers in the social economy.

Furthermore, in the same OP specific actions are indicated, such as:

- creating local networks of business, politics and civil society supporting family-friendly infrastructure;
- supporting companies’ personnel policies to reconcile family and work;
- introducing measures to support parents in the re-entry process;
- mobilising the potential of women currently out of employment, in particular of mothers with a migration background;
- increasing the share of males employed in education;
- encouraging girls to engage in the green economy, especially in energy-efficient building renovation, but also in other technical-scientific directions;
- maintaining a high share of women in start-ups in innovative, technology-oriented and knowledge-based enterprises as well as the promotion of sustainable start-ups by women.
In **Ireland**, the Operational Programme Employability, Inclusion and Learning (OP EIL)\(^{58}\) foresees three type of actions specifically and directly targeting gender issues, as described in the following box.

**Box 8: Ireland: OP EIL**

The actions specifically targeting gender issues are implemented under Axis 2, investment priority 9iii. There are three types of measures targeting women directly:

- The introduction of equality mainstreaming.
- Gender equality – the aim is to raise the employability of women detached from the labour market by offering them vocational training courses (soft competences training, basic ICT training). It is expected that participants of those actions will get a part- or full-time job, including self-employment. (In the activity implementation plan the full name of the activity is: *Gender Equality: Women returning to the workforce and women’s entrepreneurship*). Further calls are planned within this measure to be announced in 2019, which emerged from the interview with the head of the Gender Equality Unit, Department of Justice and Equality.
- *Tus Nua Project* – the aim is to support women in their social inclusion who have left prison and those with a history of offending, by a case management approach (developing skills for independent living in society).

Source: Country case studies.

In **Italy**, the OP ESF Piedmont, besides the measures supporting women employment, indirectly supports gender equality with the numerous measures addressed to families with the aim of reconciling working and family lives.

In contrast to the ESF, the TOs and IPs in the **ERDF programmes** relate to GE to a low extent, as not every intervention area has a direct impact on the equality of living conditions of women and men. However, some measures are indirectly linked to the cross-sectional objective. For example, ERDF measures supporting social infrastructures (e.g. child and elderly care) or access to ICT and transport facilities may have important gender equality effects and indirectly involve women as a target group. The following box provides examples on how some of the analysed ERDF programmes have included gender equality in their priorities.

Box 9: GE priorities in ERDF programmes: examples from case studies

**Germany**: The Regional OP for the ERDF in Mecklenburg-Vorpommern includes specific support measures, which are those to support day-care centres and high-quality care and support programmes for children in the field of sustainable urban development (Priority axis 4).

**Romania**: the Regional Operational Programme – ERDF includes three main priorities target directly women:
- Increase the quality of education and training infrastructure, with a particular focus on lifelong learning infrastructure.
- Increase accessibility to community services, health and social services.
- Promote investments for supporting the economic and social regeneration of disadvantaged communities for urban areas in the framework of CLLD strategies (TO 9.d, priority 9.1). Investments in this area specifically target women and victims of domestic violence and human trafficking, which are mostly women.

Other priorities tackle gender equality indirectly: (i) development and improvement of childcare, pre-school, vocational education/training and lifelong learning infrastructure; (ii) increase in the competitiveness of SMES from strategic fields identified in the national competitiveness strategy; (iii) territorial investments for improving people’s participation in the labour market, education, medical assistance and social services, community development and public safety.

Priorities are focused on the development of a tourism infrastructure and natural and cultural heritage, as well as energy efficiency, which might have a low impact on gender equality.

**Sweden** also promotes interventions in sectors that are still very gender segregated and where a gender perspective is not always obvious (e.g. infrastructure or climate change) in order to help understand how gender equality could be promoted in these policy fields and its positive effects.

Source: Country case studies.

**Involvement of GE stakeholders in the programming phase and in Monitoring Committees**

Overall, gender equality stakeholders were involved in the definition of the strategies to be implemented more often in ESF OPs than in ERDF OPs (see Table 11 Annex A.2).

**Figure 27: Assessment of GE in the involvement of gender equality stakeholders in OP programming phase**

![Assessment of GE in the involvement of gender equality stakeholders in OP programming phase](image)

Source: Country case studies.

However, differences exist among countries. **Italy, Spain and Sweden** show innovative and effective examples of GE stakeholders’ involvement in both the programming and implementation phases, while in the other countries the situation is less developed.

In **Italy**, a good practice in the Campania ROP (see Box 10 and Table 6 in Annex A.2) is represented by the ‘territorial gender agreements’ described in Box 8.
**Box 10: Italy: The Gender Territorial Agreements in the Campania ROP**

Following a similar experience carried out in the past programming period, territorial gender agreements between public and private entities are aimed at promoting an integrated territorial system of actions to encourage the participation of women in the labour market through the information and guidance services, and care services for early childhood.

**Beneficiaries** are the territorial networks, composed of a minimum of three to a maximum of five subjects belonging to each of the following categories: (i) territorial areas of Campania, as defined by the decision of the Regional Council no. 320 of 3 July 2012; (ii) companies or consortia of companies; (iii) trade associations, trade unions and bilateral bodies of provincial and regional importance; (iv) bodies of the third sector; (v) other interested public or private subjects. In the networks, the presence of the territorial ambit of the area (Ambito Territoriale di riferimento in Italian) is mandatory. Each subject can participate in a single gender territorial agreement, with the exception of territorial ambit areas and trade associations, trade unions and bilateral bodies. In all cases, it is possible to be the leader of a single network agreement.

A maximum value of EUR 200,000.00 can be presented, including the realisation of the following three interventions: communication plan (maximum EUR 20,000.00); Concilia Point where the activation of agreements on working hours and organisations with flexible forms of management such as hours including part time, working at home or teleworking are experimented (maximum EUR 80,000.00); vouchers (maximum EUR 60,000.00 for the purchase of care services for children between the ages of 3 and 12, and a maximum of EUR 40,000.00 for the purchase of care services for children aged 0 to 36 months).

Territorial animation and involvement of all key stakeholders of a specific territory is the more innovative factor. This allows for a smooth implementation and strong commitments of all local actors. It can be easily transferred to other territories. Guidelines and all the necessary administrative documentation is available online and can be reproduced. It was documented as part of the activities that are monitored by the dedicated working group within the technical structure of the ESF for the regions. It has been approved for the programming period in order to grant continuity to the local territories within the region. Its implementation is strongly related to a strong political commitment of the managing authorities and to the role of the authority for gender policies.

**Funding:** Total funding of EUR 10 million: EUR 5 million on OT8 (specific objective 3) and EUR 5 million on OT9 (specific objective 9).

Source: Country case studies.

**Spain** has promoted many interesting tools for gender mainstreaming and the active involvement of gender equality bodies in all stages of Structural Funds programmes. One is the requirement for a compulsory equality opinion on each Operational Programme to be prepared by the Institute for Women. This is something not required by the European Union (Box 11). In addition, as mentioned in the previous section, the ‘Network of Equality Policies between Women and Men in the Community Funds’, coordinated by the Institute for Women, is strongly involved in the country’s ESF and ERDF OPs.

**Box 11: Spain: Equality Opinion**

The Institute for Women prepares the Equality Opinion, which is included as an annex to the OPs. The opinion first analyses and guarantees the observance of the principle of equality between women and men throughout the programming process. With the equality opinion, Spain has ensured the evaluation of the gender perspective of the programmes. In addition, there is improved interrelation between the bodies that promote gender equality and the rest of the participants in the preparation of the programmes. This enhances the awareness of gender issues among key actors who were not familiar with it.

Source: Country case studies.

In **Sweden**, as summarised in the following box, two out of three OPs (including the ERDF one) show a concrete involvement of GE stakeholders.
Box 12: Sweden: selected OPs

The National ESF OP: The Ministry of Employment (responsible for the development of the ESF OP) invited relevant organisations and authorities when developing the OP. Gender mainstreaming is said to have been applied when deciding on the general objectives. Examples of some of the relevant stakeholders consulted:

- The Swedish Women’s Lobby
- Winnet (NGO working for increased female participation in society development)
- The Equality Ombudsman
- The Migration Agency

The expert evaluates as ‘relevant’ that stakeholders have been consulted which is very important to ensure the right measures are being taken.

The National ERDF programme: Several stakeholders were invited to participate in the development of the OP, among them one gender equality expert. The group of experts met twice and were also invited to give feedback on the draft of the OP.

Regional OP Upper Norrland: There are no special gender equality stakeholders mentioned in the programming phase. According to the expert, certain focal areas (e.g. technology, sustainable energy, digital services, cultural and creative industries) of the Upper Norrland regions are traditionally highly gender segregated. Thus, creating projects within these sectors to work with a gender perspective is likely to have a high impact on gender equality.

Source: Country case studies.

In Romania, the Agency for Equal Opportunities between Women and Men was involved in the definition of the regional operational programme – ERDF. The Agency involvement in all programme phases contributes to ensuring that women’s needs are considered in the programming phase and that gender priorities defined are implemented.

In Ireland, the bodies mentioned as relevant partners in the process of preparing the programme for employability, inclusion and learning are, among others: Department of Justice and Equality – former Equality Authority (currently Irish Human Rights and Equality Commission), Gender Equality Division. However, there are no organisations listed that are specifically tackling gender issues. Furthermore, there is very little information on how the gender stakeholders were involved in the process of preparing the programme and there is no summary or review of the submissions received.

Spain has promoted many interesting tools for gender mainstreaming, including the requirement for a compulsory equality opinion on each operational programme. This is something not required by the European Union (Box 11). As already mentioned in the previous section, Spain also created a ‘Network of Equality Policies between Women and Men in the Community Funds’, coordinated by the Institute for Women, which supports gender mainstreaming in the country’s ESF and ERDF OPs.

In Italy, a good practice identified in the Campania ROP (see Box 10 and Table 6 in Annex A.2) concerning the involvement of stakeholders in the programming phase is the ‘territorial gender agreements’ involving both public and private entities. This promotes an integrated territorial system of actions that encourage the participation of women in the labour market, through the implementation of information and guidance services, and care services for early childhood.

Finally, in Poland a problem has been highlighted regarding insufficient representation of gender equality organisations at the preparation and implementation stages of OPs. Non-governmental organisations dealing with gender issues are not well developed institutionally; they usually lack resources and operate on the basis of volunteering. This situation reduces their capacity to monitor the implementation of the gender equality principle in the OPs.

Besides involvement in the programming stage, gender equality stakeholders are usually involved in Monitoring Committees, to a greater extent in the ESF programme than in the ERDF programme.
Country differences are also evident in this respect. Among the considered countries, the two extremes are represented by Spain and Poland.

In Spain, the main body for the promotion of gender equality – the Institute for Women and Equal Opportunities – is active member of all the OPs Monitoring Committees. This allows the integration of the principle of equality between women and men during implementation of all the programmes to be monitored and guaranteed. Also, the Institute for Women coordinates the ‘Network of Equality Policies between Women and Men in the EU Funds’, aimed at realising the objectives in terms of equality of opportunities established in the EU, and national regulations. The network is permanently integrated by the bodies responsible for gender equality policies, as well as by the departments in charge of the administration and management of the European Structural and Investment Funds in the central and regional governments, together with representatives of the European Commission. It is a key instrument within the monitoring of all the OPs as well as a forum for communication and exchange of good practices.

On the contrary, in Poland, according to the country experts, the principle of gender equality is perceived as a harmful ideology, which makes the implementation of this principle difficult. The gender equality bodies involved in Monitoring Committees treat gender equality issues only marginally. An example is the change of functions, which occurred in 2016 in the Government Plenipotentiary for Equal Status of Women and Men; this was transformed into the Government Plenipotentiary for Civil Society and Government Plenipotentiary for Equal Treatment.

**Attention to gender equality in the OP Implementation**

**Use of GE criteria in the selection procedures, and criteria in the OPs**

An important element of the implementation phase to support gender mainstreaming is that selection procedures and criteria in published calls take into account gender equality and non-discriminatory principles. Again, this is more common in ESF OPs rather than ERDF OPs and applied to a different extent and in different ways in the considered countries.
In France, several managing authorities have set up self-assessment tools to be filled in by project promoters in their grant applications for regional ERDF-ESF programmes (e.g. Languedoc-Roussillon, Nord-Pas-de-Calais). For example, in Aquitaine, projects mobilising a total cost of more than EUR 2 million are the subject of a mandatory training action to take into account the social responsibility of organisations integrating the gender equality dimension. In some cases, as in the Centre-Val de Loire and Franche-Comté regions, more stringent gender equality criteria are adopted in the selection process. These provide for a reassessment of the projects in case of insufficient consideration of gender equality priority, or even ineligibility for funding when consideration of gender equality falls below a minimum level.

In Germany, gender equality is established as selection criteria for the Federal ESF OP, amounting to 15 out of 100 points maximum to be obtained by applicants for substantial and plausible answers to gender equality questions. Less attention to gender criteria in selection procedures is present in regional OPs (see Table 12 in Annex A.2).

In Ireland, the EIL programme provides guidance for intermediate bodies and beneficiaries on calls for proposals, indicating that project selection criteria must ensure that the projects will be assessed on the basis of their compliance and their promotion of the horizontal principles. The project applications must describe how the planned actions will contribute to the implementation of each of the horizontal principles.

In the Italian regional ESF OP Campania, in some cases selection procedures and criteria taking into account gender equality and non-discriminatory principles are included in published calls.

In Poland, in projects co-financed by the ESF the so-called minimum standard is applied. This is a set of minimum conditions a project should meet in terms of gender equality. The minimum standards consist of six questions that are the part of the project assessment grid. However, no information has been provided on how this principle has been implemented. The three selected ERDF OPs show a lower attention in terms of gender equality with respect to the ESF one: there are only instructions on how to fill in the application form for project implementation of the Operational Programme Digital Poland. It is said that each proposal should include a description of the positive or neutral impact of the project on horizontal principles, including the principle of equality between women and men.

In Romania, gender equality is mainstreamed in the selection criteria of all three programmes considered. The main limit is related to the lack of a homogenous approach to the way the principle is mainstreamed in selection criteria. While in most cases specific points are granted for the contribution of the projects to gender equality, in others points are awarded for the respect of horizontal principles that besides gender equality, include sustainable development and ICT.
All the Spanish OPs analysed include gender equality criteria for the selection and prioritisation of operations. These are clearer and stricter in the case of ESF OPs, although good practices of selection criteria in ERDF have been found and documented in the country report. Documents with criteria for the selection of operations approved by the Institute for Women contain compulsory criteria and prioritising criteria. A good practice example (Box 13) is the adoption of gender equality criteria in the selection of the operations to be financed by the Integrated Sustainable Urban Development Strategies Programme.


The participation of the ‘Network of Equality Policies between Women and Men in the Community Funds’ in the selection of Integrated Sustainable Urban Development Strategies can be considered a good practice. The Network has prepared the document *Methodology for the assessment of the incorporation of the gender perspective in the Integrated Sustainable Urban Development Strategies*. In addition, it has participated with the Commission for the assessment of the strategies in the first and second calls, developing a specific methodology according to the specificities of the urban strategies. One of the criteria for assigning the score has been the integration into the strategies of the horizontal and transversal objectives, including gender equality. Thus, the network has issued individualised reports for each strategy that have been considered in the process of selection.

Source: Country case studies.

Finally, in Sweden, all projects receiving support from the ESF or ERDF OPs considered must ensure that they:

- have gender equality competence internally or through external support;
- conduct a gender equality analysis as a part of the problem analysis;
- take into account the gender equality perspective in activities;
- describe gender-specific patterns with quantitative and qualitative data.

In addition, in the Regional OP Upper Norrland, one criterion in the guiding principles for selection of operations is to select projects/interventions that illustrate and implement gender equality as a horizontal criterion, and therefore as a means to achieve sustainable growth. All projects must describe in the application/description how they will go about using gender equality as a horizontal perspective during the development, implementation, monitoring and evaluation phases.

**Gender equality in annual implementation reports, and actions supporting gender mainstreaming in implementation**

Also, the annual implementation reports submitted in 2017 address gender equality to different extents across programmes and countries.
In **Germany**, implementation reports contain systematic differentiation of the indicators between men and women. For example, the Regional OP for the ERDF in North Rhine Westphalia implementation reports regularly review the implementation of the cross-cutting gender equality target.

In **Romania**, although in the programming phase most of the analysed programmes tackle gender equality indirectly, in the implementation some of the priorities mentioned are directly targeted to women. This is for instance the case of priorities regarding the fight against poverty and social exclusion included in the human capital programme, that are directly targeted to women in the implementation phase.

In some countries, training, guidelines and checklists for the assessment of horizontal principles have been developed, also with reference to ERDF programmes. Some Operational Programmes provide additional training, e.g. the **Swedish** ERDF Upper Norrland Operational Programme whose staff continuously participate in training on gender equality. Training is also provided to beneficiaries by the regional growth offices through the government programme *Gender equal regional growth*, which is perceived as a great support for beneficiaries.

In **Italy**, in some cases at the regional level a specific gender governance system has been created, and/or specific tools and procedures have been implemented to support gender mainstreaming in all programmes. This is for example, the case for the Authority for Gender Policies and the drafting of the Gender Equality Strategic Programmatic Act in the Campania ROP, the Regional Coordination Table for gender policies in the Tuscany ROP, and the financial amount reserved for interventions targeting women in objectives that are not specifically dedicated to them.

Finally, in **Spain**, Cohesion Policy has become a driving force for national policies. Therefore, pilots, projects and policies led by the EU have been implemented in Spain in a permanent way. Thus, gender criteria that have been introduced through Cohesion Policy have provoked social changes that have influenced national policies and have been adopted at a country level.

On the contrary and as already mentioned, for **Poland**, assessing whether the gender equality horizontal principle is properly implemented is very difficult currently. Although specific guidelines have been prepared for the implementation of the principle of non-discrimination (see Box 14 below), according to stakeholders interviewed the understanding of the concept of the gender perspective among representatives of the institutions involved in the implementation of Operational Programmes is very limited. Members of monitoring committees still lack the knowledge on how to implement it in concrete projects, especially within the ERDF OPs, which are perceived by the vast majority as being ‘gender neutral’.
Box 14: Poland: Guidelines for the implementation of the principle of equal opportunities and non-discrimination

Guidelines for the implementation of the principle of equal opportunities and non-discrimination, including accessibility for people with disabilities, and the principle of equal opportunities for women and men as part of EU funds for 2014-2020.

This is a document aimed at ensuring coordination and uniform implementation of two horizontal principles. First, the principle of equal opportunities and non-discrimination, including accessibility for people with disabilities; second, the principle of equal opportunities for women and men. Both principles apply to institutions involved in the process at all stages of implementation, including programming, implementation, monitoring and evaluation.

This document put an obligation on the groups responsible for Cohesion Policy implementation to follow the equal opportunities and non-discrimination principle, including accessibility for people with disabilities and equality between women and men. The guidelines provide a detailed description on how to implement OPs, e.g. criteria for project selection, control obligations for the aspects mentioned, and reporting in this respect during the process of project implementation. According to experts, this is an important document providing a basis for additional materials to help beneficiaries to implement these principles, as well as to control whether they have been implemented. A manual, ‘How to implement the principle of equal opportunities for women and men in projects funded from European funds 2014-2020: A guide for people implementing projects and institutions of the implementation system’ can serve as an example of such additional materials.

Source: Country case studies.

Monitoring and evaluation systems in the selected OPs

According to the assessments provided by the country experts, the monitoring and evaluation systems in the selected OPs address gender equality to a medium-high extent for ESF programmes, and a medium-low extent in the ERDF programmes (Figure 321).

Figure 31: Assessment of relevance for GE of the monitoring and evaluation systems in OPs

Furthermore, the case studies provide examples on how and to what extent gender-disaggregated data and indicators are collected and considered in monitoring activities, besides the common indicators included in the Regulatory Framework and those presented in the Open Cohesion database analysed in Chapter 2.4 (for further information, see Table 13 in the Annex A.2).

For example, in France, the Annual Implementation Report produced by the Ministry of Employment ‘Rapport d’analyse et d’évaluation du suivi des deux programmes opérationnels: PON FSE 2014-2020 et PO IEJ 2014-2020 Analyse de la programmation sous l’angle des principes horizontaux’ (31 May 2017) describes the use of indicators in the national OP Employment and Social Inclusion and the national OP Youth Employment. According to this analysis, in these PONs the two indicators used are those collected in
the Open Cohesion database and analysed in Section 2.4. The ‘Number of projects dedicated to the sustainable participation and progress of women in employment and indicator’, and the secondary theme of the ESF Node (TS-FSE 07), which includes gender equality among the mandatory indicators (other than realisation and results), have to be indicated by project leaders. In addition, in NOP Employment beneficiaries must indicate whether or not their project is ‘combating the feminisation of poverty, reducing gender segregation and stereotypes of gender in the labour market, in education and training, promoting the reconciliation of social times and the equitable sharing of domestic tasks between men and women’.

In Germany, the Federal ESF programme has set up a gender budgeting approach (see Box 15) which is obligatory in monitoring and evaluation for an assessment of the share of the funds used for women. Stakeholders view gender budgeting as a good practice and a crucial instrument for looking at progress in gender equality measuring the proportions of women or shares of programme funds. It is a clear and concise indicator, and thus can be understood by people who are not well trained in using a gender approach.

Box 15: Germany: Gender budgeting (2007-2013)

Gender budgeting was foreseen already in the ESF Federal Programme in the programming period 2007-2013 as a key instrument for implementing gender mainstreaming. It has been continued in the current programming period. The objective is to provide women with a share of approximately 50% of the participation-related programme expenditure. This target refers to projects in which participants are counted, and to specific projects in the field of equal opportunities.

Gender budgeting is based on the numbers generated in the monitoring of the ESF. The participation data is merged with the financial data to determine the actual distribution of funds between women and men. Gender budgeting takes into account the gender distribution in ESF projects, but also the proportion of projects geared to equality and the per capita costs.

Stakeholders involved: ESF Fund Administration, ESF programmes and responsible government departments, Institut für Sozialforschung und Gesellschaftspolitik (ISG) for the calculations, Agentur für Querschnittsziele im ESF (support structure) for annual publication of the reports.

Gender budgeting as implemented in the federal ESF is unique in the European Union. There have been activities to transfer the experience, for instance through the European Institute for Gender Equality (EIGE). The practice requires relatively little financing but rests on the willingness of ESF programmes to supply the data.

The success in gender budgeting is that it is easy to communicate, even to actors with little awareness for gender issues and little previous exposure to the topic. In these cases, it is often easier to appeal to statistical numbers than to conceptual issues. Gender budgeting is, therefore, accepted by stakeholders. However, it needs to be supported by more information. For instance, the financial share does not answer the question of whether the effects of Cohesion Policy are greater for men or women.

Source: Country case studies.

In the Irish EIL programme, data on participants for 2017 are not broken down by sex. Also in the Regional OP Border, Midland and Western only some of the statistics relating to the number of participants are broken down by gender, but the programme-specific indicators are only shown in total.

In Romania, gender equality is mainstreamed in the monitoring phase through specific reporting on the contribution of projects to equal opportunities and the involvement of gender equality bodies in the monitoring committees of the programmes (e.g. Agency for Equal Opportunities between Women and Men). Specific or horizontal evaluations are also envisaged.

---

59 The reports for years 2014-2016 are currently not available online.
In **Poland**, among the selected OPs, only the OP Knowledge Education development 2014-2020 provides relevant targets for gender equality. No data are available for the three ERDF programmes.

In **Spain** most of the OPs have explicitly foreseen their main expected results for gender equality, with the exception of the Youth Employment ESF OP. Gender-sensitive and gender-relevant indicators are in place for all the OPs, however their late approval has resulted in evaluation/implementation reports not containing data on participants by sex.

**Sweden**: Currently, there are no standardised procedures for how to measure the gender equality effects and impacts of the Operational Programmes. Only certain project results are monitored using gender segregated statistics (e.g. number of female/male project leaders). This means it is difficult to measure how effective the measures are in addressing gender equality. However, all projects regularly report on their work with gender equality in the form of qualitative assessment reports. This is considered good by the managers interviewed, since it enables each project to discuss its own specific challenges and contexts. Two of the interviewees requested further support for how they can complement this qualitative assessment with quantitative indicators.

**Initial evidence on gender equality effects of implemented OPs**

Although cohesion programmes are still being implemented and data are often missing and difficult to interpret, some initial evidence on their results and outcomes is emerging from the available indicators.

As expected (Figure 32 and Table 15 in Annex A.2) results and outcomes are more relevant in the ESF programmes compared to those for ERDF, also due to the difficulty to measure gender equality effects for interventions not targeted to people and the lack of proper gender equality indicators.

**Figure 32**: Assessment of relevance for GE of main (expected) outcomes and results for gender equality in the OPs

![Figure 32: Assessment of relevance for GE of main (expected) outcomes and results for gender equality in the OPs](image)

Source: Country case studies.

An initial indication emerges from the indicator available in the Open Cohesion database (and presented in Section 2.4) on the number of projects implemented in 2015-2016 supporting women in employment. As anticipated in Section 2.4, only 12 countries have implemented this type of project and data are not available for Romania and Ireland. The six remaining countries considered in this report have concentrated the largest amount of projects directly targeted to women’s employment in 2015-2016, i.e. 4,910 equivalent to 86 % of the total number implemented in the UE. The largest number of projects (3,472) is in Germany, followed at a distance by France (537), Italy (366) and Spain (322). Much lower numbers are for Poland (173) and Sweden (40).

As shown in Figure 33 below, the six countries also differ in the composition of these projects by theme. While in France and Italy the largest share is under the social inclusion theme, in Spain, Poland and
Germany the largest number is under the sustainable and quality employment theme, while in Sweden a relatively high share, compared to the other countries, are projects promoted under the education and training theme.

**Figure 33:** Number of projects supporting women into employment by theme – projects implemented in 2015-2016 in the selected countries

Some additional data are provided by the country reports (see Annex B) showing that in general, women represent less than half of participants in measures targeted to people.

For example, in France in the 7,127 approved projects under the 200 activities specifically focused on professional equality and the integration of women funded between 2014 and 2018, women are 48% of the 981,873 participants. In the 440 projects approved under the NOP Youth Employment, women are 46% of the 206,614 participants.

It is similar for Italy, where in the ESF Regional OP Campania women represent 46% of all recipients up to now.

### 3.2.4. Examples of projects indicated as good practices

Interviewed stakeholders in the country case studies have indicated some projects as examples of good practices for gender quality that show how gender mainstreaming could effectively be implemented in both ESF and ERDF intervention fields (see Table 16 in Annex A.2).

In France, two projects have been indicated:

The project *PETALE — Promouvoir l’Egalité dans les Transports et les Activités Logistiques pour l’Emploi* promoted by AFT, the development agency for vocational training in transport and logistics of the Union of Transport Federations (NOP Employment and Social Inclusion). The project is developing:

- gender equality tools (video, commercials, tutorials to destroy stereotypes, practical guides and toolkits, etc.);
- a census of single-sex professions;
- workshops with social partners and business leaders to promote awareness of the opening of these trades to women;
- European benchmarking for the dissemination of good practices related to reconciliation.

The project *MIX'TOURS* is promoted by Mission locale de Cornouaille (Bretagne). This project won the *Trophée d’Or des Initiatives FSE 2016* in the category ‘territorial innovation’. It supports young women
between the ages of 16 and 25 who want to work and/or move in traditionally male professional sectors through various actions such as mix’tours or days discovering trades in traditionally male sectors. It also broadens the gendered vision of professions and allows young women to move towards less feminine professional sectors were there are employment opportunities. Therefore, action aims to respond to the issue of sustainable integration of young women.

This is an innovative action as it addresses young girls by offering new services: they travel all over the local territory to discover women who have made different choices: they are contacted and meetings with companies and training bodies are organised. To take these actions, young people form a group and rent a minibus to visit companies and training organisations. Young people can discover work environments, employment and training prospects to let them connect with the economic reality of the territory. This action, because of its simplicity of implementation, can easily be duplicated in different sectors and territories.

In Romania, a 2008-2011 project ‘Project ESTHR – Equal opportunities for women in Romania’ has been indicated as an example of good practice for GE. The aim is to promote the equal opportunities principle in Romanian society and in particular, on the Romanian labour market. The project included the following in the specific objectives: identification of the nature of gender discrimination at the local level; promotion of equal opportunities in the Romanian public administration; creation of new jobs and personal development of women; creation of a nationwide network of gender committees. The main innovation consisted of the creation of specific gender structures and gender support services included in the regulations of one of the most relevant trade unions in Romania.

According to the ‘Evaluation of the way in which provisions regarding equal opportunities have been mainstreamed in the Romanian Framework of Structural Instruments’ undertaken by the Ministry of European Funds in 2013, the project is characterised by a high level of replicability. It can be addressed to women who are not necessarily members of a trade union, but are affected by discrimination on the labour market, and it can be extended to other social, economic and public institutions. Regarding transferability elements, according to the 2013 evaluation, the project could be transferred to other vulnerable groups (e.g. youth, Roma). The research and guidelines drafted within the project may also be used in other contexts.

Furthermore, the sustainability of the project results is ensured by the inclusion of the gender committees and topics related to equal opportunities in the regulations of the trade union promoting the project.

In Spain, one of the good practices identified under this OP is the Business Support Programme for Women (Programa de Apoyo Empresarial a las Mujeres, PAEM), a national network programme implemented by more than 50 chambers of commerce in Spain, aimed at promoting self-employment and entrepreneurship among women of all ages. In particular, it aims to promote social entrepreneurship among women by providing guidance, advice and support when microcredit is requested. Now fifteen years active, it has positioned itself as an exemplary programme in the field of business advice. It has the financial support of the Institute for Women.

The existence of support services for the creation of companies specific to women is an innovation in itself. On the other hand, the collaboration between the Institute for Women and the chambers of commerce in a programme aimed at the creation of companies has been an innovative element of high value for the success of the programme. On the other hand, the presence of the chambers of commerce in all the Spanish territory is a key factor for the access of women in different locations.

The establishment of a support service for the creation of companies specifically for women can be easily replicated due to the low complexity of the project. In this sense, collaboration between agents
promoting business activity and bodies in charge of promoting equality between women and men is essential for transferability.

A second good practice considered in the Spanish case study is the project ‘DANA, Employment and Entrepreneurship in Equality’ (Empleo y Emprendimiento en Igualdad), developed by the Women’s Foundation (Fundación Mujeres). This develops a comprehensive intervention to combat discrimination and promote equal opportunities for women and men in the field of employment. The empowerment training for employment that develops skills for the search and access to employment is finding a very good acceptance by the participants and with good results of personal empowerment. On the other hand, the greatest difficulties are found in online training due to the low level of digital literacy of the participants.

The establishment of such a programme can be easily replicated due to the low complexity of the project. In this sense, collaboration with regional/local bodies together with companies and labour organisations are key in order to ensure the integral approach, placing the efforts not only with women but also in the workplaces.

In Italy, Gender Territorial Agreements were identified as a good practice. They are agreements between public and private entities aimed at promoting an integrated territorial system of actions that encourage the participation of women in the labour market, through the promotion and implementation of information and guidance services and care for early childhood. Territorial animation and involvement of all key stakeholders of a specific territory is the more innovative factor. This allows for a smooth implementation and strong commitments of all local actors. As far concerns main outputs, 24 are the projects started for about 1,500 women involved in more than 30 municipalities in Campania.

Finally, in the Swedish case study, successful projects also in the ERDF intervention fields are the following.

- **Knowledge rules – emergency services for everyone!** (Kunskap äger – Räddningstjänsten inkluderar!). This is a project aiming to create structural changes and build enough knowledge and tools within the organisation in order to ensure that the gender equality and non-discriminatory principles are mainstreamed in all decisions, processes and evaluations. It involves all the full-time and part-time workers at the emergency services and all the politicians of the emergency committee in the region.

  There is a six-step model for attitude-influencing skills development based on a thematic approach to all the grounds of discrimination. First, a common knowledge base is created within the organisation; then norms and values are visualised at a group and individual level through national and transnational exchange of experience of practical examples. These experiences are collected, processed and monitored by the steering group (and the management team). This is achieved in dialogue with the working groups and during the project’s local consultation meetings on discrimination, in order to make visible the development needs of the organisation and operations. This approach ensures sustainability of the project, but also that increased knowledge and changing attitudes have structural impacts and effects.

- **Coaches for energy and climate** (Coacher för energi och klimat) to support SMEs to reduce their energy consumption (and minimise their environmental impact). The coaches (50 individuals) were provided with training in intersectional analysis and norm criticism. They were trained for half a day by an external consultant. This enabled the coaches to apply an intersectional perspective when providing support to the SMEs, something which they report
on four times a year to the project management. Both the training itself and the reporting four times a year has, according to the project management, been successful. It is said to be beneficial that the training was provided by an external consultant rather than from someone in-house.

- **Inclusive growth in the forestry sector through innovative cooperation** (*Inkluderande tillväxt i skogssektorn genom innovativ samverkan*), in a programme that ended in 2017. The programme aimed to develop knowledge and methods for gender equality and diversity in the forestry sector in the counties of Norrbotten and Västerbotten, through innovative collaboration between business, academia and society. The networks formed through this project continue to exist and meet regularly. The horizontal principles were central when deciding on working methods and tools to be used internally. The principles made certain aspects visible, which helped the project to contribute to its objectives.
4. STRENGTHS AND WEAKNESSES OF COHESION POLICY IN ADDRESSING GENDER EQUALITY ACCORDING TO KEY STAKEHOLDERS

KEY FINDINGS

The 42 respondents to the online survey represent all the main stakeholders involved in Cohesion Policy: NGOs, public authorities, Gender Equality bodies, the social partners, EU desk officers, managing authorities and thematic experts. According to them, the Cohesion Policy regulations provide a good legal basis to address gender inequalities through the dual approach especially in relation to certain policy areas, such as access to the labour market, childcare and non-discrimination. They also point out that attention to gender equality in Cohesion Policy has improved in this programming period.

However, many respondents report that a gender equality perspective is lacking in national and regional programmes and, especially in the case of the ERDF, investments have not been prioritised in order to have a stronger equality impact. In the 2014-2020 programming period, gender equality is often considered only as a ‘formal’ horizontal principle to be mainstreamed and not a core aspect of Cohesion Policy. In this way, gender equality is not emphasised enough, and concrete measures to support gender equality are often absent.

According to almost two-thirds of respondents (61.8 %), gender equality was largely addressed in the programming phase, while the least addressed are the project implementation and monitoring phases. There is a diffused opinion that many gender equality aspects considered in the programming phase are not fully taken on board during the implementation phase or cannot be tracked, especially in ERDF programmes. Therefore, respondents show pessimistic perceptions on the likely achievements in terms of gender equality. Only around a third of respondents believe this might happen, also due to the lack of political commitment on gender equality.

Ex ante conditionalities and ex ante evaluations of the expected gender impacts of Operational Programmes are considered very effective in raising awareness among the managing authorities and projects’ promoters, and in introducing a gender perspective in the programme implementation. The involvement of gender equality institutions and non-governmental organisations in Partnership Agreements and monitoring committees is instead still considered problematic, and does not result in an effective involvement.

Among specific tools to support gender mainstreaming in the current programming period, the gender disaggregation of data and the adoption of appropriate selection procedures are considered useful by a large majority of respondents.

The perceptions of the 23 national stakeholders interviewed in the case studies are in line with these results. The main perceived strengths of the current programming period are considered: the focus on gender mainstreaming, and the development of specific tools and guidelines for its implementation. Among the main weaknesses, the gap between programming and implementation is mentioned the most. This is followed by the lack of awareness and knowledge on how to implement gender mainstreaming among operators, especially managing authorities and beneficiaries of ERDF programmes.

Interviewed stakeholders also underline the differences across countries on how much the gender perspective has been internalised in Cohesion Policy, with Sweden and Spain showing a higher commitment at both the political and operative levels than the other countries. However, all countries show an improvement in the current programming period compared to the previous ones.
4.1. The perceptions of stakeholders responding to the online survey

The web-based survey was aimed at investigating the perceptions of Cohesion Policy stakeholders on the role of the 2014-2020 Cohesion Policy in supporting gender equality. It had a focus on main implementation strategies and mechanism, as well as on future challenges for the post-2020 programming period.

The survey was targeted to members of EU groups and umbrella organisations involved both in the implementation of the ESI funds and dealing with gender-related issues. In particular, the stakeholders contacted were:

- EU desk officers for ERDF and ESF;
- members of the high-level groups involved in the governance of Cohesion Policy;
- thematic experts/evaluators and participants in the existing EU networks and forums on Cohesion Policy;
- representatives of EU umbrella associations of stakeholders, e.g. the European Social Platform, the EU trade unions (ETUC and ETUI);
- participants in the ESF Transnational Platform Conference 2017 (beneficiaries, MAs, ministries, agencies, etc.);
- the Women’s Lobby;
- members of the High-level Group on Gender Mainstreaming and members of the Advisory Committee on Equal Opportunities for women and men.

In total, 42 stakeholders completed the whole questionnaire. Respondents originated from 19 European countries, with the largest group (seven, equivalent to 16.7 %) from Belgium, followed by Austria, Estonia and Spain (three each, 7.1 %), Bulgaria, Czech Republic, Greece, Malta, Poland and Slovenia (two each, 4.8 %) and others.

As it can be seen in Figure 34, respondents belonged to the following groups: NGOs (10 respondents, equivalent to 26.3 % of the total), public authorities and gender equality bodies (7 respondents each, equivalent to 36.8 % in total), EU desk officer (4) and representatives of the social partners (4), representatives of managing authorities and thematic experts (3 each).

Figure 34: Percentage distribution for stakeholder’s typology

<table>
<thead>
<tr>
<th>Stakeholder Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU desk officer</td>
<td>10,5</td>
</tr>
<tr>
<td>Thematic expert</td>
<td>7,9</td>
</tr>
<tr>
<td>Managing authority</td>
<td>7,9</td>
</tr>
<tr>
<td>Gender equality body</td>
<td>18,4</td>
</tr>
<tr>
<td>Public authority</td>
<td>18,4</td>
</tr>
<tr>
<td>NGOs</td>
<td>26,3</td>
</tr>
<tr>
<td>Social partners</td>
<td>10,5</td>
</tr>
</tbody>
</table>


---

---

---
4.1.1. Opinions on the 2014-2020 Cohesion Policy as a tool to support gender equality

Stakeholders were asked their opinion on whether Cohesion Policy can be considered as a policy tool to support gender equality. Figure 35 shows that around 60% of respondents expressed a positive opinion. It is interesting to note that positive answers are more frequent when considering the EU level (62%) compared to the national level. At the national level, more than one in five (21%) respondents believe that Cohesion Policy cannot be considered as a policy tool to improve gender equality, due to the lack of attention to gender equality in the national intervention logic. Conversely, the majority of positive answers in relation to the EU level are motivated by the advanced level of gender equality policies here. In addition, they are influenced by the numerous funding opportunities and other support measures (for example expert meetings, exchange of practices and long-term programmes) provided by EU institutions to implement gender equality in Cohesion Policy.

According to some respondents, the ESIF regulations (e.g. Article 7 of the CPR) provide a good legal basis to address gender inequalities through the dual approach (combining targeted funding with gender mainstreaming). This is particularly the case in relation to certain policy areas such as access to the labour market, childcare and non-discrimination. In this way, according to respondents, the 2014-2020 Cohesion Policy can represent an effective policy tool towards gender equality especially due to its inclusion among the horizontal principles supporting gender mainstreaming in all the activities implemented in Cohesion programmes.

Figure 35: 2014-2020 Cohesion Policy as a policy tool to support gender equality in the EU and in your country (%)


However, many respondents highlight that a gender equality perspective is lacking in national and regional Cohesion Policy programmes. Investments, especially in the case of the ERDF, have not been prioritised in order to have a stronger equality impact. In the 2014-2020 programming period, gender equality is often considered only as a ‘formal’ horizontal principle to be mainstreamed and not a core aspect of Cohesion Policy. In this way, gender equality is not emphasised enough, and concrete measures to support gender equality are often absent.

Similar results are obtained when considering the consistency of Cohesion Policy measures with gender equality needs. Around half of respondents believe that the implemented measures are not always consistent with the gender equality issues present at both the EU and country levels. In most cases, the gender equality focus of funds is on women’s access to the labour market, either directly supporting women’s employability, or providing childcare facilities. Other gender equality dimensions are instead often neglected, as clearly stated by some of the respondents: ‘It is just about women’s participation in the labour market and not about gender equality!’ It is acknowledged that in some cases the policy needs are not under the scope of Cohesion Policy: ‘There are some very specific problems about gender equality not solved yet. Professional segregation, gender pay gap, under-representation in...’
management boards etc.’ However, there is also a lack of focus on gender equality in policy fields that could be addressed by Cohesion Policy. ‘Gender equality is not included in the 5 concrete objectives nor in the 11 thematic areas; consequently, it is assumed that it is included, at least, in the thematic areas 8 to 11 but this is not specified. And even though these objectives could only be achieved by properly taking into account women’s empowerment, room for gender matters is more often than not hard to get, highlighting the real need of gender-sensitive funds.’

**Figure 36:** Consistency of 2014-2020 Cohesion Policy options and envisaged measures with the EU and your country’s main gender equality issues (%)

<table>
<thead>
<tr>
<th>Your Country</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>7,3</td>
<td>2,4</td>
</tr>
<tr>
<td>9,8</td>
<td>4,8</td>
</tr>
<tr>
<td>39,0</td>
<td>42,9</td>
</tr>
<tr>
<td>29,3</td>
<td>33,3</td>
</tr>
<tr>
<td>14,6</td>
<td>16,7</td>
</tr>
</tbody>
</table>


The lack of attention to gender equality issues in Cohesion Policy is reflected in the respondents’ pessimistic perceptions on the likely achievements of expected gender equality effects of Cohesion Policy. Only around a third of respondents believe this might happen, especially at country level. This is mainly motivated by the lack of political commitment on gender equality, but also by the fact that Cohesion Policy implementation still lags behind. There is not a specific monitoring and evaluation (but also gender budgeting and/or auditing) effort to know the effects on gender equality of the actions implemented. ‘Effects are not yet in the focus of Cohesion investments. Programmes and measures are highly oriented towards absorption and outputs. Although planning and programme design provides for positive effects in gender equality, there is no such aspect in project audit and accountability’. Notwithstanding these problems, some respondents agree that gender-sensitive interventions are increasingly considered in Operational Programmes.

**Figure 37:** Achievement of 2014-2020 Cohesion Policy main expected effects towards gender equality in the EU and in your country (%)

<table>
<thead>
<tr>
<th>Your Country</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>7,7</td>
<td>2,5</td>
</tr>
<tr>
<td>28,2</td>
<td>20,0</td>
</tr>
<tr>
<td>33,3</td>
<td>40,0</td>
</tr>
<tr>
<td>28,2</td>
<td>35,0</td>
</tr>
<tr>
<td>2,6</td>
<td>2,5</td>
</tr>
</tbody>
</table>

4.1.2. Opinions on Cohesion Policy implementation strategies and mechanisms along the policy cycle

The survey explored the respondents’ perceptions on whether, and how, the regulatory changes introduced in the 2014-2020 period improved gender mainstreaming compared to the previous programming period.

As shown in Figure 38 below, mechanisms in place in the initial phase of the policy cycle (e.g. the ex ante conditions on gender equality and the ex ante evaluation appraising the adequacy of the programme for gender equality) are those considered more relevant by respondents for gender mainstreaming at the national and local levels. Almost half (47 %) of respondents consider these changes as important or very important in raising awareness among the managing authorities and project promoters, and in introducing a gender perspective in the programme implementations.

The involvement of gender equality institutions and non-governmental organisations in Partnership Agreements and monitoring committees is still considered problematic. According to respondents, these mechanisms are in many cases only formal, as something that needs to be done, and do not result in an effective involvement.

As stated by a respondent: ‘In comparison to the previous programme a lot more focus was placed on the gender issue, and the process of awareness-raising that was started before has begun to show results, even though a lot still needs to be done; but the steps are promising and lead in the right direction.’ However, others state that: ‘Most of the above-mentioned measures were only “met on paper” and didn’t result in a real action for GM ... there are no resources for gender expertise. The EO bodies are overwhelmed by these requests for advice/partnership. Window dressing.’

Figure 38: Improvement of gender mainstreaming in the 2014-2020 regulatory framework compared to the previous programming period (%)
of the partnership principle according to a gender dimension is again considered the least useful, but it is also less known among respondents. Gender data disaggregation is perceived as useful or very useful by almost all respondents (82.9 %) in order to measure the gender equality effects of Cohesion Policy. Appropriate selection procedures and criteria taking into account gender equality and the gender analysis of needs of both women and men follow. This was considered useful or very useful by 77.1 % of respondents although, as pointed out by a respondent, ‘taking gender into account in the selection of the projects remains very difficult: how to “measure” if the promoter really is taking actions for GM’.

However, as pointed out by some respondents, these tools were also available in the previous programming period but little used: ‘These tools are very useful. However, they existed in the previous framework but were not fully respected’.

**Figure 39: Usefulness of changes/tools adopted at the EU level in supporting ESF beneficiaries’ participation and activities (scoring 4 and 5), %**

<table>
<thead>
<tr>
<th>Change/Tool</th>
<th>Usefulness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monitoring procedures are drafted for supporting the evaluation of cohesion policy in the area of gender equality</td>
<td>71.4</td>
</tr>
<tr>
<td>The partnership principle has declined to take into account the gender dimensions</td>
<td>52.9</td>
</tr>
<tr>
<td>Managing authorities make sure that the project holder has carried out an analysis of the needs of men and women and/or of the impact of a project on men and women, as well as the needs of groups which suffered from discrimination</td>
<td>77.1</td>
</tr>
<tr>
<td>Appropriate selection procedures and criteria take into account gender equality and non-discrimination principles.</td>
<td>77.1</td>
</tr>
<tr>
<td>Data are broken down by gender whenever possible</td>
<td>82.9</td>
</tr>
</tbody>
</table>


When asked about which phase of the policy cycle the gender dimension has addressed more, almost **two-thirds of respondents (61.8 %) indicate the programming phase**, while in the project monitoring and project implementation phases, gender equality was the least addressed (with 26.4 % and 23.5 % of respondents considering it little addressed or not addressed at all). As stated by one respondent, these phases ‘were not sufficiently addressed, leaving too much space for non-compliance’.

In part these perceptions depend on the fact that **implementation is still lagging behind** in many Member States. However, there is an opinion among respondents that many gender equality aspects considered in the programming phase are not fully addressed during the implementation phase, or cannot be tracked. As stated by one respondent, ‘The method for the implementation of gender mainstreaming should be established. For example, to make the European standard on gender mainstreaming in ESF mandatory’. 
In some cases, specific tools have been implemented at the national level to support gender mainstreaming. Two-thirds of respondents know about specific tools that were implemented at national level to facilitate the support of the gender mainstreaming principle. Among the tools most cited by respondents are the provision of guidance materials or manuals on gender equality (40.5 % of respondents), and training provisions or the exchange of experiences on gender equality measures. Conversely, the least cited tools are the provision of technical assistance to beneficiaries on gender equality issues (with only 9.5 % of indicating this tool), and the creation of monitoring systems including a gender dimension (16.7 %).

Training and exchange of experiences on gender equality are also generally mentioned as examples of good practices that can be referred to, for achieving a greater gender equality. Some specific experiences have also been mentioned, such as the Slovenian gender mainstreaming project which provides training and other gender equality implementation tools\(^{61}\) or the Estonian project \textit{NAISED & MEHED, Võrdsed õigused, võrdne vastutus} (WOMEN & MEN, equal rights, equal responsibility)\(^{62}\).

\(^{61}\)\url{http://www.mddsz.gov.si/si/delovna_podroca/enake_moznosti/projekti_iz_sredstev_eu/integracija_nacela_enakosti_spolov_stratesko/}

\(^{62}\)\url{https://www.sm.ee/sites/default/files/content-editors/Ministeerium_kontaktid/Valjaanded/naised_mehed_seadus.pdf}
4.1.3. Improving the intervention capacity of post-2020 Cohesion Policy in addressing future challenges for gender equality

Almost all respondents (94%) think that more effort is needed to support gender mainstreaming in the post-2020 Cohesion Policy. Again, it is the implementation phase that would need more effort, according to 59.5% of respondents, followed by the programming phase (cited by 50.0%).

Figure 42: Policy cycle phase in which more effort is needed to support gender mainstreaming (% respondents)


Aligned with what was pinpointed before, among the tools considered as more effective to support gender mainstreaming the most cited are:

1. targeted information measures on gender equality related issues for beneficiaries (cited by 47.6% of respondents),
2. **training and exchange of experiences** on gender equality-related issues (45.2 %),

3. **an evaluation system** drafted according to a gender dimension (45.2 %).

**Figure 43:** Tools considered to be more effective to support gender mainstreaming (% respondents)

<table>
<thead>
<tr>
<th>Tool</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training and exchange of experiences on gender equality-related issues</td>
<td>45.2%</td>
</tr>
<tr>
<td>Provision of guidance materials/manuals on gender equality-related issues</td>
<td>31.0%</td>
</tr>
<tr>
<td>Targeted information measures on gender equality issues for beneficiaries</td>
<td>31.0%</td>
</tr>
<tr>
<td>Contact points and provision of TA on gender equality related issues to beneficiaries</td>
<td>31.0%</td>
</tr>
<tr>
<td>Monitoring systems drafted according to a gender dimension</td>
<td>42.9%</td>
</tr>
<tr>
<td>Evaluation systems drafted according to a gender dimension</td>
<td>45.2%</td>
</tr>
<tr>
<td>Stronger involvement of gender equality bodies and associations in all the phases of the policy cycle</td>
<td>38.1%</td>
</tr>
</tbody>
</table>


Finally, respondents were asked for their views on future challenges for the post-2020 Cohesion Policy with regard to gender equality. Most of the reported challenges arise from the analysis of what seems to have not worked so far. In particular, they refer to **gender equality being no longer a strong issue on the political agenda in many Member States**. According to some respondents this little attention to gender equality is related to the fact that it is now considered together with the more general horizontal priority of equal opportunities for all, including other disadvantaged groups (for example the disabled). To overcome this challenge, many respondents suggest that more specific and direct actions towards gender equality should be implemented. Providing extra support to achieve a better and common understanding on what gender equality and gender mainstreaming are and how to apply this to each action/project is particularly necessary, according to the respondents.

The Cohesion Policy 2021-2027 could address these challenges through the provision of guidance documents and training sessions, disseminating concrete examples of good practices on gender mainstreaming. Moreover, at the project selection stage, **the criteria for gender mainstreaming should be strengthened** through higher scoring and requirements for more practical actions. To achieve all these goals, respondents also suggested that the EU regulation should be written in a clearer and more explicit way, and be binding in relation to gender equality.

**4.2. The perceptions of national stakeholders in the selected countries**

Overall, **23 national stakeholders were interviewed in the country case studies**. As shown in Figure 44, the interviewed stakeholders are **mainly representatives of the managing authorities**; however, there are also representatives of all the other main stakeholders involved in Cohesion Policy as well as gender equality bodies. The list of the organisations the interviewed stakeholders belong to is presented in Annex A.4.
4.2.1. Main strengths and weaknesses of Cohesion Policy in addressing gender equality according to national stakeholders

The national stakeholders were interviewed in the selected countries on the perceived strengths and weaknesses of Cohesion Policy in addressing gender equality. Their opinions are in line with those collected in the web survey although with some differences, reflecting the socio-economic conditions and Cohesion Policy frameworks present in each country.

Among the common perceptions, the following are the main ones:

- **Cohesion Policy is considered as an important tool to support gender equality** in the policy domains it addresses. There have been improvements in the gender awareness and capacity of key stakeholders to address gender equality principles in the different stages of the policy cycle. Interviewed stakeholders also acknowledge the crucial role of EU institutions and Cohesion Policy regulations in supporting gender mainstreaming in Member States.

- However, gender equality is still mainly addressed in a very general manner and limited to the ESF policy domains. The only one including a gender-specific investment priority to support female employment is TO8 (8.iv). There is instead still a generalised lack of awareness of the potential gender effects of ERDF interventions, besides those supporting childcare infrastructures. Investment priorities and measures supporting entrepreneurship and SMEs, research and development, ICT and physical infrastructures are usually not adopting a gender perspective, for example by explicitly targeting women and supporting measures aimed at reducing gender gaps in accessibility. No measures are addressing the promotion of gender equality in other policy domains, such as gender equality in decision-making, combating gender violence or reducing gender gaps in earnings.

- **Gender equality issues are mainly addressed in the context analysis and in the programming phase**, while less attention is given to it in the implementation and monitoring/evaluation phases. As described in Chapter 3, only a few countries (e.g. France, Spain, Sweden) also show attention to gender equality in the implementation phase, for example introducing specific and binding indications in project selection criteria, and few have defined monitoring and evaluation systems adopting a gender perspective.

- The **lack of a strong political commitment** on gender equality and awareness of the importance of gender equality not only for women and for an inclusive society, but also for all the population (including men), and for economic growth and territorial development, is another common issue.

Many stakeholders believe that the gender mainstreaming approach and the inclusion of gender equality among the general principle of equal opportunities for all, risks reducing attention to targeted actions to support gender equality and women’s empowerment.

All the stakeholders interviewed underline the need for technical assistance and training targeted to MAs and beneficiaries on how to implement gender mainstreaming in all the interventions supported by the Cohesion Policy.

While these perceptions are common among all the stakeholders interviewed in the case studies, there are national specificities that have been highlighted in the case studies and are summarised in Table 1 in Annex A.3 and in the text below.

In France, although attention to gender equality issues in the PA is widespread, the gender mainstreaming approach is pursued more or less exclusively under the ESF programmes. This is justified by the interviewed stakeholders on the basis that the ERDF has other priorities and is not a focus on people but on enterprises. However, there are also shortcomings when assessing the ESF OPs, as gender equality is mainly addressed in relation to measures supporting female employment and care services, but not in other policy domains. For example, among national ESF OPs, while the NOP Employment and Social Inclusion considers gender equality among its priorities with a dedicated attention in all three axes, the NOP Youth Employment does not consider the gender dimension at all. This is explained as a strategic choice to concentrate the focus and budget on youth, independently of gender differences, leaving this to the monitoring and evaluation activities to also analyse its impact on gender equality.

Other problematic issues highlighted by the interviewed stakeholders include the high variability of relevance assigned to gender equality in regional OPs. This, and the lack of sufficient resources for the many priorities to be addressed makes it difficult to earmark resources for gender equality actions in all thematic areas. Finally, interviewees described the problems related to low political commitment on gender equality, the lack of a coordinated governance framework on gender equality, and the limited national guidelines and technical support. They also mentioned the scarce communication actions, including the dissemination of good practices.

In Germany, the stakeholders interviewed acknowledge the crucial role of EU institutions and regulations in supporting gender mainstreaming. However, they underline a lack of implementation control from the EU level after the OPs have been formulated. This results in gender equality often not being dealt with at all in the monitoring committees at the regional level, in particular in the ERDF context. Indeed, as in France, ERDF programmes are generally considered as having little direct relation to gender equality, being not directed to people.

The extensive treatment of gender equality in the socio-economic analysis and the use of gender-differentiated data was seen as a highly successful tool for advancing gender equality. According to the interviewed stakeholders, in dealing with actors with little awareness for gender issues and little previous exposure to the topic, it is often easier to appeal to statistical numbers than to conceptual issues. For this reason, all interviewed stakeholders are convinced that introducing gender budgeting into the ESI funds would be a major step ahead.

Among the most important enabling factors in Germany, the interviewed stakeholders point out the high commitment and personal continuity and expertise on gender equality and non-discrimination in implementing bodies. In addition, the establishment of gender equality support structures at the federal level for the ESF, and at the regional level, are considered important. Examples
are the ESF Baden-Württemberg and the ERDF in Mecklenburg-Vorpommern, involving gender equality stakeholders such as the Landesfrauenrat or independent researchers.

According to the interviewed stakeholders, attention to gender equality in the planning stage was favoured by the strong commitment and expertise of the main federal implementing bodies (such as the Federal Institute for Vocational Education and Training, the Federal Institute for Research on Building, Urban Affairs and Spatial Development, and others).

However, the lack of a binding gender equality strategy at the federal and regional levels is considered among the main weaknesses. In those Länder (e.g. Mecklenburg-Vorpommern) where a gender equality strategy is in place, it ceased to be binding after 2015.

Another problem is the fact that for many actors gender equality is only considered as an additional administrative burden, while they do not see the benefits of pursuing gender equality for socio-economic growth. According to one of the interviewed stakeholders, about ten to fifteen per cent of actors involved in the ESF and ERDF refuse to cooperate on the topic of gender equality, and refuse technical assistance on these issues. Two measures are implemented by the federal government on gender budgeting (see Box 15 in Chapter 3) and the creation of a specific support structure for gender equality (see Box 6 in Chapter 3). These are considered particularly useful in improving awareness on the benefits of adopting a gender equality perspective for achieving better performance in the implemented programmes.

The difficulty in fully integrating gender equality in project selection and monitoring, as well as in the programmes’ monitoring and evaluation systems, has been also reported. According to the interviewed stakeholders, evaluation teams often do not have the necessary competence on this topic and do not know what questions they have to ask. The interviewed stakeholders, however, point out that in Germany the gender mainstreaming working group in the German Society for Evaluation could provide support to this end.

Turning to Italy, the interviewed stakeholders highlight the strong attention to gender equality in the PA. This applies not only in the context analysis, but also in the provisions for adopting gender equality criteria in selection procedures and gender-relevant indicators in the monitoring and evaluation systems.

Another strength mentioned in the Italian case is the alignment of the gender approach adopted in ESF and ERDF programmes with the gender needs in the country. For example, the low female employment rates, the under-representation of women in certain economic sectors and gender segregation in education and training systems, and the wide gender gaps in earnings are addressed in the context analysis of the PA. Women are recognised as a target group to be addressed in order to overcome Italy’s weaknesses.

At the regional level, in some cases a gender governance system has been created, and/or specific tools and procedures have been implemented to support gender mainstreaming in all programmes. This is for example, the case for the Authority for Gender Policies and the drafting of the Gender Equality Strategic Programmatic Act in the Campania ROP, the Regional Coordination Table for gender policies in the Tuscany ROP, and the financial amount reserved to interventions targeting women in objectives that are not specifically dedicated to them.

Among the main weaknesses emerging from the analysis and stakeholders’ interviews is the fact that, as in other countries, the gender perspective has been often internalised in a formal way. This mainly follows the requirements set by the European Commission without a real commitment to gender
equality going beyond what was prescribed at the European level. To this end, what seems to be **missing is a strong governance asset** to coordinate strategies and interventions on gender equality. National and regional managing authorities are left to their ‘goodwill’ and to their own devices. In addition, the tools that were created in the last programming periods have not been updated according to the 2014-2020 new architecture, and new guidelines were not provided.

Another shortcoming is the predominant approach to consider women as a ‘weak’ target group to be ‘protected’ with inclusive measures, and not as a crucial asset to improve Italian socio-economic development. For example, reconciliation measures are seen as indirect actions to support women, and not as measures that support the whole economy and all the population (men included), and promote a strong cultural and social change at a country level. This approach also explains why gender equality issues are not considered when dealing with sectors and interventions that are within the main ERDF domains.

According to the interviewed stakeholders these weaknesses largely derive from the **low political commitment on gender equality**, with the **gender mainstreaming principle** only seen as something that ‘needs to be there’ in a formal way and that can be limited to the minimum requirements.

There is also a **deficit in communication** on how regional and national programmes are performing, which undermines the potential capacity building related to the exchange and dissemination of good practices.

In **Ireland**, interviewed stakeholders indicate that among the strengths of the Cohesion Policy in addressing gender equality is the **focus on female participation in the labour market**. This addresses the low employment rates among the Irish women compared to the EU average. Another mentioned strength is the presence of a **National Strategy for Women and Girls 2017-2020** that addresses gender equality issues in different policy domain areas and targets specific groups.

Among the main weaknesses mentioned is that **gender equality challenges and needs are treated mostly in a very general manner**. For example, the PA lacks specific recommendations for implementing the gender equality principle. However, in OP EIL, the annual implementation report mentions launching the work of the horizontal principles working group, following a recommendation of the monitoring committee.

In addition, the socio-economic context analysis does not provide any in-depth analysis on the causes and consequences of women’s under-representation in the labour market and the need to raise the levels of women’s employability, for example by enhancing the accessibility of affordable childcare. The emphasis on employability also tends to exclude several vulnerable groups of women (and men) from benefitting from the actions within the frameworks of Cohesion Policy. For example, in Ireland the criteria for potential participants to ESF employability measures were considered as ‘too narrow’ by project beneficiaries and excluding, for example, women using the Jobseeker allowance. The expert from the National Women’s Council of Ireland (NWCI) emphasised the need to extend the strategy of inclusion to other areas besides employment. The quality of employment for women in Ireland should also be considered, as they tend to occupy most of the low-paid jobs. Furthermore, as reported in Chapter 3, there is no mention of more complex measures that could enhance women’s socio-economic conditions (e.g. raising female entrepreneurship, promoting women in decision-making, reducing gender segregation in STEM areas, supporting access to affordable childcare). No concrete indications are provided on how to incorporate a gender perspective in monitoring procedures as well as in other stages of implementing the programmes and on selection procedures.
Another issue mentioned in the Irish case is the need to invest in strengthening the overall governance of the funds, in order to increase their effectiveness. This needs to allow more space for policy innovations and strategic ideas about the internalisation of gender equality in the future shaping of Cohesion Policy at the national level. A better coordination of the existing structures, which seem to be quite fragmented, is also needed according to the interviewed stakeholders.

**Poland** has a **very well-structured, formal implementation process** for the gender equality principle; however, experts differ in their opinions on the degree to which the gender perspective has been **effectively internalised in Cohesion Policy**. Gender equality was taken into consideration in the preparation of the Partnership Agreement in the 2014-2020 programming period, thanks to the **concrete EU regulations and indications**. These obliged Poland to include a gender perspective despite overall political reluctance towards the term itself. From a formal point of view, the gender perspective has been included in all the Operational Programmes. As described in Chapter 3, each OP has a specific chapter devoted to what has to be done from the gender perspective and has been subjected to a gender equality evaluation. In addition, guidelines, which refer not only to ESF but also to ERDF OPs, have been made available on how to implement gender equality. Furthermore, the Government Plenipotentiary for Equal Status of Women and Men is included in all monitoring committees.

However, the interviewed experts point out that the horizontal approach is applied in a superficial way without a thorough understanding of its meaning. For example, at the stage of proposal evaluation it was only required to mark the existence of inequalities; it was not necessary to explain how the project was going to address these inequalities. In addition, the programme **stakeholders and members of monitoring committees still lack knowledge on how to implement the gender perspective in concrete projects, especially within the ERDF OPs**, which are perceived as being gender neutral. In OPs co-financed by the ERDF, the ‘double approach’ is not mandatory and the gender equality principle in these OPs is taken into account only as a horizontal aspect.

Other gender weaknesses pointed out by interviewed stakeholders include the **lack of gender awareness among implementing bodies, monitoring committees and beneficiaries**; the **insufficient involvement of gender equality organisations** in the preparation and implementation of OPs and in monitoring committees; and the **lack of political commitment**, in a framework where the gender perspective is negatively perceived.

In **Romania**, according to actors interviewed, **attention to gender equality is stronger in the current programming period compared to the previous one**. Interviews reveal that this is mainly due to the **provisions of the ESIF regulations** that require all programmes to include a specific section detailing the main actions undertaken for gender mainstreaming. Another factor is the existence of a **specific ex ante conditionality on gender equality**. The *ex ante* conditionality contributed not only to increase the gender equality awareness of institutions and ESIF stakeholders, but also to the identification of specific actions targeted to women. It also contributed to the evolution from a mere declaration of intents on gender equality, as in the past programming period, to a clear strategy and actions to implement it. As indicated in Chapter 3, to comply with the *ex ante* conditionality Romania drafted the 2014-2017 **Gender Equality Strategy**, which was renewed at the end of 2017. This included the 2018-2021 strategy and an action plan focusing on gender equality in five main policy domains (pillars): (i) education; (ii) health policies; (iii) labour market policies; (iv) decision-making processes; (v) an integrated approach to gender equality.

The gender equality strategy provides the framework for ESIF programme main priorities, as well as for ESIF beneficiaries’ project contributions to gender equality. For instance, in the case of the ERDF
Regional Operational Programme, social and health services to be funded within the CLLD priorities have to be aligned to the priorities and measures included in the strategy for gender equality. Specific awards are envisaged in the selection criteria, although calls for proposals do not assess equal opportunities in a homogenous way. Furthermore, a set of specific actions has been adopted to improve the mainstreaming of gender equality in Cohesion Policy, according to the provisions of the ex ante conditionality. This includes the recommendations resulting from the 2013 independent evaluation on the mainstreaming of gender equality in the 2007-2013 programming period, including:

i. implementation of specific actions targeted to women in all programmes, with a focus on the reduction of social exclusion and poverty particularly in the case of Roma or disabled women;

ii. design of mainstreaming actions for non-targeted interventions to promote gender equality, e.g. the inclusion of gender equality in the selection criteria of interventions not directly targeted to gender equality in the three analysed OPs;

iii. the provision of guidance to beneficiaries on how to promote gender equality in their projects;

iv. the definition of gender-specific selection criteria and tools for checking whether gender analyses are carried out at project level, and for ensuring the sustainability of the project results in the area of gender equality;

v. inclusion of gender-relevant and gender-disaggregated indicators in the programmes’ monitoring system and the planning of specific evaluations of gender equality in the ESIF programmes, and mainstreaming of the gender perspective in the evaluation of all programmes;

In addition, a representative of the Agency for Equality between women and men is involved in the monitoring committees of all programmes. Notwithstanding these positive elements, interviewed stakeholders believe that the implementation of these aspects is still lacking. The analysis of gender gaps and the use of positive actions in the analysed OPs is still limited to the ESF policy domains (e.g. labour market, NEET, lifelong learning and education). The use of gender equality criteria in selection procedures and gender indicators in monitoring systems is also limited. The capacity of beneficiaries (e.g. local institutions, NGOs) to go beyond ensuring equal involvement of women and men in the project and to implement specific gender equality measures that could contribute to the reduction of gender gaps is still very limited.

Spain: According to the stakeholders interviewed, the gender perspective has been largely internalised in the Cohesion Policy in Spain, mainly due to the country’s political commitment, which has gone beyond the requirements set by the European Commission.

For example, Spain created a Network of gender equality policies in the Community funds, coordinated by the Institute for Women and aimed at realising the equal opportunities objective established in the EU and national regulations (see Box 6 in Chapter 3). Spain also introduced a compulsory equality opinion for each Operational Programme, which promoted the evaluation of the gender perspective in all the programmes. This improved networking between the gender equality bodies and the other stakeholders, enhancing awareness on gender issues among the programmes’ key actors who were not familiar with it. Thanks to these provisions, ERDF managing bodies are also improving their awareness of gender issues and attention to the equality between women and men in the implementation of OPs. For example, the interviewed stakeholders underline the important role of the collaboration between the Network of Equality Policies between Women and Men in the Community Funds and the managing bodies of the ERDF Multi-regional Operational Programme. These introduce gender criteria in the selection of the operations to be financed by the Integrated
Sustainable Urban Development Strategies. They also point out that Cohesion Policy gender criteria have also been adopted for national policies and this guarantees their long-term sustainability.

On the other hand, the main weakness highlighted by the stakeholders interviewed regard the non-obligatory nature of the fulfilment of gender requirements, as well as weaknesses in communication actions, including the dissemination of good practices. There are also weaknesses related to the inclusion of gender issues in the ERDF Operational Programmes, although they seem to be in the process of being resolved through the above-mentioned network. Shortcomings have also been observed in the design of the ESF Operational Programmes resulting in difficulties of access for women to certain activities.

Sweden is a country where the gender perspective has been mostly prioritised at the political level over the last decades. This has resulted in gender equality becoming more and more internalised in the government’s policy and steering documents, regulating and guiding government institutions and agencies. According to the interviewed stakeholders, this implies that government officials in general are familiar with the concept of gender mainstreaming and with working towards gender equality objectives in all areas. Indeed, all the managing authorities interviewed for this study are used to working with the gender equality perspective, despite them being responsible for programmes and working areas that are not addressing gender equality as a first priority. The perspective is well integrated in the selection and assessment procedures.

For the ERDF Operational Programmes, there has been a further emphasis on the mainstreaming perspective in the current programme period. Beneficiaries are required to adopt the gender equality perspective during all stages and descriptions of their projects. Training, guidelines and checklists for the assessments of horizontal principles have been developed, also with reference to ERDF programmes. Some Operational Programmes provide additional training, e.g. the ERDF Upper Norland Operational Programme whose staff continuously participate in training on gender equality. Training is also provided to beneficiaries by the regional growth offices through the government programme ‘Gender equal regional growth’, which is perceived as a great support for beneficiaries.

The interviewees believe that having many different actors addressing the issue enables networking and knowledge sharing between the initiatives, thus enhancing the effectiveness of adopted gender equality measures. It also generates synergies between government institutions and Cohesion Policy actors. However, the networking aspect is perceived as something that should be further enhanced.

There are some weaknesses and challenges in this country. The main ones emphasised by the interviewed stakeholders relate to the following:

- **The lack of common standardised methods for selection criteria and monitoring systems.** Both the ESF and the ERDF Operational Programmes use qualitative checklists when assessing the gender equality perspective in the selection and monitoring procedures. However, there are no common guidelines and procedures. Lack of standardised procedures, concrete tools and training on this matter create uncertainties and problems, according to some of the interviewees. Others state that qualitative tools enable greater flexibility according to the contextual differences among projects. One of the stakeholders also suggests that the gender equality perspective should be evaluated and taken into consideration by the auditors in the same way as other objectives.

- **The difficulties of fully ensuring that the gender perspective is effectively mainstreamed.** While many officials and beneficiaries are familiar with the gender mainstreaming concept, often they do not know how to work with it, especially where the perspective is not very self-evident, e.g.
within ERDF-supported, low-carbon economy projects or space technology. Moreover, since gender equality is no longer explicitly addressed, it becomes more difficult to assess for the programme officers involved in project selection and monitoring. Time limitations, long administrative procedures and a lack of training and clear assessment tools are also further complicating the gender equality assessment procedure.

- **The lack of continuous training** for the internal staff of Cohesion Policy implementation bodies and beneficiaries is another issue raised by the interviewees. Although new staff members are offered some training as a part of their induction training, this is not considered sufficient (as was pointed out by an evaluation completed by the previous programme). The ESF Operational Programme started to address this problem in the beginning of the current programming period but due to administrative issues, rotation of staff and conflicting opinions within the responsible organisation, this process stagnated.

4.2.2. Main challenges and proposed solutions according to stakeholders

All the stakeholders interviewed in the country case studies point out that one of the most relevant challenges is the overall reduced attention to gender equality in the political agenda in recent years. This is happening both at EU and national political levels, and there is a risk that a lower political commitment is reflected in the Cohesion Policy post-2020 programming period.

In this respect, most of the interviewed stakeholders show scepticism as to whether gender equality will receive more attention at the European level in the coming programming period. The German interviewees report that there has already been a noticeable change since 2015. For example, in the Employment Guidelines, the integrated approach to equality has almost disappeared and this is reflected in the drafts of the new ESF Regulation, where the article on gender equality falls short of the detailed and specific contents of Regulation 1303/2013. However, the Council Working Group meetings have just started and gender equality has not yet been on the agenda. As also underlined by the Spanish stakeholders interviewed, the draft regulations are a step backwards in gender issues, as these issues are placed at a secondary level. For example, by including all inequalities together makes individual ones less visible.

Reduced attention to gender equality in post-2020 Cohesion Policy is considered a problem by most interviewees, because gender equality and gender mainstreaming are also on the retreat at the national level. For example, in Germany, while gender mainstreaming used to be widely applied, today the Federal Environment Agency (Umweltbundesamt) is the only context (apart from ESF) in which gender mainstreaming is currently implemented at the federal level; it was abandoned elsewhere. Thus, gender mainstreaming is no longer a principle of action for the federal government, although the government is still legally committed to it. In Poland, the interviewed stakeholders underline how the principle of gender equality is increasingly perceived as a harmful ideology at the political level, which makes its implementation difficult. For example, although the Government Plenipotentiary for Equal Status of Women and Men should be represented in each of the Monitoring Committees, in 2016 this function was transformed into the Government Plenipotentiary for Civil Society and Government Plenipotentiary for Equal Treatment. In practice, it means that the current Plenipotentiary treats gender equality issues marginally.

The Romanian stakeholders interviewed add the need for further actions to increase the capacity of potential ERDF and ESF beneficiaries, especially at the local level. This also implies the need to address gender equality not only from a social inclusion perspective, but also in an economic perspective, given the potential contribution of women to socio-economic growth and local
development. However, the persistence of gender stereotypes, deeply rooted in all areas of society, calls for strengthened educational and awareness-raising actions.

Other issues raised by national stakeholders relate to the **lack of funding**. In particular, the French stakeholders point out the difficulty in funding gender equality actions in all thematic areas. Especially in countries that suffered the most from the effects of the economic crisis (e.g. Ireland, Italy and Spain), budget constraints had a serious impact on funding the public bodies responsible for the implementation of gender equality policies, also on NGOs and third-sector organisations promoting gender equality measures.
## 5. CONCLUSIONS AND RECOMMENDATIONS FOR THE POST-2020 PROGRAMMING PERIOD

### KEY FINDINGS

Cohesion Policy can have an important role in promoting gender equality. It can support measures directly targeting women and gender equality via ESF measures promoting employment, social inclusion and investments in human capital. It can also do this via ERDF measures supporting business start-ups and entrepreneurship among women and with indirect measures, reducing the gender gap in research and innovation, and in access to transport, ICT and social infrastructures.

All the analysed PAs and OPs declare that they observe the principles of equal opportunities and non-discrimination. However, a number of critical points emerge from the analysis and interviews with the main Cohesion Policy stakeholders that may reduce the effectiveness of CP’s contributions to gender equality. The main ones are: the gap between formal statements and actual implementation, also due to the lack of knowledge on how to concretely support gender mainstreaming; the difficulty in mainstreaming the gender equality principle into the ERDF intervention fields; the use of selection criteria, and monitoring and evaluation systems only weakly gender-oriented; the difficulty in actively involving gender equality bodies in the programme design and implementation. The weak political commitment to gender equality is another critical point.

There are initiatives in some Member States to improve gender mainstreaming via knowledge sharing, technical assistance, continuous training and general awareness raising. These initiatives show that gender mainstreaming could be much more effective with the adoption of appropriate mechanisms and tools.

The stakeholders’ opinion on the post-2020 programming period is generally critical. The draft proposals fall short of the detailed and specific contents of Regulation 1303/2013 and there is scepticism as to whether gender equality will receive more attention at the European level in the coming programming period. This lack of support for gender equality would be a problem because gender equality is also on the retreat at the national level.

To overcome the challenges, stakeholders underline the need to provide clear guidelines and support for the effective implementation of the dual approach to gender equality in CP, by:

- introducing compulsory requirements on GE in all the post-2020 OPs, with specific and transversal measures to be translated into all operations, and enforcing compliance through specific obligations (for example, in selection criteria and monitoring & evaluation systems) and binding guidelines;
- maintaining the *ex ante* requirement of developing a national GE strategy to underpin CP interventions, in order to improve its effectiveness and value added in relation to gender equality;
- requiring and supporting the creation of partnerships with gender equality representatives from civil society;
- supporting the creation of coordination and monitoring bodies to support gender mainstreaming in all the policy domains of CP and in all programme phases, and to strengthen the role of bodies in charge of gender equality;
- improving the capacity of all the CP actors on gender equality and gender mainstreaming to enhance the gender dimension of Cohesion Policy and to support innovative actions;
- developing concrete tools and guidelines as well as training programmes for all stakeholders, tailored to the specific policy domains addressed;
- ensuring a strong political commitment to GE at EU and national levels, in order to enhance the attention and commitment of all national and local stakeholders to gender equality not only in a human rights perspective, but also as a crucial factor for socio-economic development.
5.1. Conclusions and lessons learned

Cohesion Policy can have an important role in promoting gender equality in a wide number of intervention areas.

First, it can support measures directly targeting disadvantaged and vulnerable population groups, mainly via ESF measures supporting employment, social inclusion and investments in human capital. Through ERDF measures it can also support business start-ups and entrepreneurship among women, and measures reducing the gender gap in access to research and innovation, in access to physical, ICT and social infrastructures, and facilitating the work-life balance. As shown in the analysis of Cohesion Policy financial allocations, resources allocated to measures that could directly or indirectly potentially support gender equality are rather consistent. They reached 55.1% of the overall allocations for the 2014-2020 programming period.

Second, Cohesion Policy has become a driving force for national and regional policies and could support a greater attention to gender equality and guarantee their long-term sustainability. For example, in Spain, Cohesion Policy gender criteria have also been adopted for national policies.

All the analysed PAs and OPs in the country case studies declare that they observe the principles of equal opportunities and non-discrimination, this being also enshrined in national legislation. Indications on rules and guidelines in the application of these principles are often provided by managing authorities or other programme stakeholders.

However, a number of critical points emerged from the analysis and the interviews with Cohesion Policy stakeholders that may reduce the effectiveness of Cohesion Policy’s contributions to gender equality:

- The weak political commitment to gender equality. The principle of equality between women and men has not been considered as essential at the political level. Commitment to the gender mainstreaming principle is just seen as something that ‘needs to be there’ in a formal way, and that can be limited to the minimum requirements. In addition, the financial crisis contributed to making equality issues a low priority at both institutional and societal levels. The political context also has a strong influence. A clear example is Poland, where, according to the interviewed stakeholders, the principle of gender equality is perceived as a harmful ideology. This makes its implementation difficult in all policies, including Cohesion Policy. The low political commitment on gender equality risks creating a compromise in the effective fulfilment of gender requirements.

- The gap between formal statements and actual implementation. Gender equality is usually presented as a broad principle in the programming phase, but it is rarely broken down into gender-specific objectives, or objectives that include a gender equality perspective. Although the implementation is still lagging behind in many Member States, there is a widespread perception among stakeholders that many aspects considered within the programming phase are not fully considered during the implementation phase. In some cases, gender mainstreaming has been used as a way to reduce existing funds further for positive actions on gender equality. In the implementation phase, the selection criteria used to evaluate applications are not generally gender sensitive. Together with a lack of gender awareness among applicants, this implies that the gender equality impacts of Cohesion Policy are likely to be much lower than their potential. The difficulty in moving from formal statements to actual implementation is likely to reduce the potential effects of the provisions adopted in the programming phases. In monitoring and evaluation systems, usually only a limited set of
The lack of gender competence within the institutions in charge of ESI funds and among project applicants. This is particularly the case for the ERDF policy domains that are not perceived as having a differentiated gender impact (e.g. research and innovation, environmental policy fields, transport and ICT infrastructures). Gender equality is often considered only in objectives that are more directly and easily associated with gender inequalities, while much less so in objectives less easily associated with gender issues (e.g. energy, transport, ICT, waste). The ERDF policy domains usually considered for gender equality concern social services (and particularly childcare facilities) and their accessibility. Instead, little attention is given to supporting gender equality in research and businesses, and in the provision of products and services improving the quality of life of women and men. In the ESF, apart from the investment priority specifically addressing women’s integration in the labour market, the other investment priorities are usually targeted to all disadvantaged groups with no specific attention to gender equality. As underlined by one of the stakeholders interviewed in the web survey, the focus on gender mainstreaming through the horizontal principle risks reducing attention to gender equality among managing authorities and project promoters. In some cases, the stakeholders interviewed justify the lack of a gender perspective in ERDF interventions with arguments related to the need for strategic focusing (as in the French YEI initiative) or the presence of trade-offs between pursuing gender equality and project sustainability (as in the German case). These arguments demonstrate a lack of awareness on how a gender perspective may be pursued in ERDF interventions without losing strategic focus or reducing project sustainability.

The difficulty in actively involving gender equality bodies in the programme design and implementation. This may reduce the effectiveness of the implemented actions in addressing the needs of women. As emerged from the Polish case study, there is an insufficient representation of gender equality organisations at the stage of OP preparation and implementation. These types of activities require a lot of commitment and workload without any additional funds. Non-governmental organisations dealing with gender issues are not well developed institutionally; they usually lack resources and operate through volunteering. This impacts on how the implementation of the gender equality principle is monitored.

The case studies presented in the study also show how the analysed countries have supported gender mainstreaming in Cohesion Policy, providing interesting indications of successful mechanisms and examples of good practices. The activities and results pursued by Cohesion Policy programmes in some cases show that the internalisation of the gender equality principle is possible, and it can achieve good results. This is especially the case in the presence of a specific governance system in place, and the strong will and commitment of the Managing Authority.

Member States have supported knowledge sharing, technical assistance and the provision of concrete guidelines, training and general awareness-raising among all the stakeholders of cohesion policy, including managing bodies and beneficiaries. According to the German stakeholders
interviewed, the main factor for strengthening gender equality at the national, regional and project levels is raising the competences of actors with respect to gender equality and gender mainstreaming. Actors need to be made aware that a gender approach also leads to an improvement in the results, and need to be informed with respect to the different methodological approaches and tools available for its implementation. Poland, for example, has a very well-prepared implementation process for the gender equality principle in terms of formalities. Each Operational Programme includes a description of the implementation of this principle, as well as it having been the subject of gender equality evaluation.

The set-up of specific governance and networking mechanisms and bodies (for example, gender equality bodies) to coordinate and support gender mainstreaming is another way to ensure a better implementation of gender mainstreaming in Cohesion Policy. This is the case of Spain, where a Network of gender equality policies in the Community Funds has been set up, coordinated by the Institute for Women and aiming to realise the equal opportunities objective established in the EU and national regulations (see Box 6 in Chapter 3). Thanks to these provisions, the ERDF managing bodies are also increasing their awareness of gender issues; considerations of equality between women and men in the implementation of OPs is beginning to be adopted. An example of this is the collaboration between the Network of Equality Policies between Women and Men in the Community Funds and the managing bodies of the ERDF Multi-regional Spain Operational Programme, for the gender evaluation of the Integrated Sustainable Urban Development Strategies as a part of the evaluation criteria for the selection of operations. The importance of networking among Cohesion Policy and gender equality stakeholders is also underlined by the Swedish stakeholders, as it promotes knowledge sharing between the initiatives and enhances the effectiveness of adopted gender equality measures. It also generates synergies between government institutions and Cohesion Policy actors. In Germany, the establishment of gender equality support structures at the federal level for the ESF, and at the regional level, are considered important in this respect. For example, the Agentur für Querschnittsziele (see Box 6 in Chapter 3) provides support and technical assistance to the MAs and project beneficiaries on how gender equality can be addressed in the ESI funds. In Italy, too, a gender governance has been created in some regional programmes, often together with the use of specific tools and procedures aimed at internalising a gender perspective in programme implementation. This is, for example, the case in the Authority for Gender Policies and the drafting of the Gender Equality Stratmatic Act in the Campania ROP, the regional body of coordination (Tavolo di coordinamento) for gender policies in the Tuscany ROP.

Likewise, the introduction of selection criteria taking into account the gender perspective, particularly in the case of the ESF, is an important factor to promote gender equality in the implementation of the programmes.

Monitoring and evaluation systems should be designed to internalise the gender perspective, for example by including gender-relevant and gender-sensitive indicators. There should also be a common reporting strategy based on clear directions on monitoring how gender issues are considered in the implementation phase. For example, various intermediate bodies often apply their own monitoring strategies, reporting results that are gender-disaggregated without a unified methodology. This makes it difficult to aggregate the information and to reach conclusions at that level.

On a more general level, the experience of Romania and Germany show the importance of having a national gender equality strategy that links Cohesion Policy strategies and interventions. Thanks to a greater alignment with national/regional needs, and stronger synergies with national and regional policies, this would ensure a greater added value and sustainability of Cohesion Policy interventions.
To this end, the interviewed stakeholders highlight the importance of the *ex ante* conditionalities on *gender equality* and the *ex ante* evaluation appraising the adequacy of the programme for gender equality. *Ex ante* conditionalities are considered particularly effective in supporting the definition and implementation of national strategies for gender equality in Romania. These are also effective in raising gender awareness in the implementation of the projects, and the management of the programme.

The **commitment to gender equality at the political level and in the Cohesion Policy managing bodies** is also considered very important for gender mainstreaming. For example, in Germany, at the national level it was crucial to bring it into the implementation at the planning stage before 2014. A major advantage was that those responsible at the federal level were committed to gender equality and strongly pushed the issue into the OP, and further into the implementation stage.

### 5.2. **Future challenges and policy recommendations for the post-2020 programming period**

As described in Chapter 2, the Commission’s draft proposals for post-2020 Cohesion Policy show a much lower attention to gender equality compared to the current programming period. The interviewed stakeholders highlight the importance of Cohesion Policy regulations, and tools in supporting attention to gender equality. This is not only for interventions co-funded by ESI funds, but also for national and regional policies. The choice of reducing attention to gender equality and gender mainstreaming in the draft proposals is thus seen with concern, especially in this period when at the national level the political commitment to gender equality is also minimal. The interviewed stakeholders also highlight the important role of EU regulation and commitment at higher levels, in particular the EU and national levels, for the formulation of national and regional programmes.

The stakeholders’ perspectives regarding the post-2020 programming period is generally critical. The drafts of the new ESF regulation are, in their view, disappointing, as the contents of the draft proposals fall short of the detailed and specific contents of Regulation 1303/2013. At the same time, the stakeholders are aware that there is a difficult conflict between the objective of strengthening gender equality and the desire to make the ESI funds easier to handle. The actors remain sceptical as to whether gender equality will receive more attention at the European level in the coming programming period. According to one of the stakeholders, the best that can be hoped for is no change, but it is more likely that gender equality will receive less attention in the next programming period. This lack of support for gender equality would be a problem because gender equality is also on the retreat at the national level.

To overcome the challenges at national and European levels, the interviewed stakeholders stress the need to maintain a strong attention to gender equality and to provide clear guidelines and support to the effective implementation of the dual approach to gender equality in Cohesion Policy.

According to the interviewed stakeholders, this implies the need to do the following.

- **Maintain a gender equality objective** in all the post-2020 Operational Programmes, according to the dual strategy combining specific and transversal measures, to be translated into all operations. This also implies **avoiding the integration of all the different inequalities into one general category, which is essential to make progress in terms of gender equality**. In the absence of precise objectives on gender equality, the transversal treatment of gender risks a downgrading of gender equality and gender mainstreaming goals in the policy agenda. This risk is increased by the recent tendency to merge all grounds of discrimination, including discrimination based on sex, within the promotion of civil rights and equal treatment for all. As shown in the Polish, Romanian and German cases, the introduction of the principle of gender equality through regulations that obliges Member States to implement it properly may
have positive effects at the national level. An extension and refinement of the scope of gender equality activities that countries are obliged to implement is worth consideration.

- **Enforce compliance with gender issues** through specific obligations and binding guidelines. For example:
  
  - the requirement to define gender priorities based on evidence on gender gaps and needs;
  - the identification of a set of measures to deal with gender gaps in all policy fields, introducing selection criteria taking into account the gender perspective;
  - the requirement for continuous monitoring, and evaluation of how a gender equality approach is being implemented together with its outcomes.

  Specific gender indicators and the collection of gender-disaggregated data should be part of the monitoring and evaluation of intervention co-funded with Structural and Cohesion Funds.

- **Maintain the ex ante conditionality on the presence of a national gender equality strategy** which underpin Cohesion Policy interventions, in order to enhance synergies with national and regional gender equality strategies. In addition, improve Cohesion Policy effectiveness and value added in relation to gender equality, as shown in the Romanian case. The German stakeholders point out that it would be extremely helpful if the EU would require Member States to set up a national gender equality strategy.

- **Enhance the capacity of all the Cohesion Policy actors on gender equality and gender mainstreaming** in order to improve the gender dimension of Cohesion Policy and to support innovative actions. Actors need to be made aware that a gender approach can be adopted in all policy domains; a gender approach also leads to a better programme performance and socio-economic development. Actors also need to be informed with respect to the different methodological approaches and tools that could be adopted for gender mainstreaming. The interviewed actors underline that further actions are needed to increase the capacity of both implementing bodies and potential ERDF and ESF beneficiaries. This is especially relevant at the local level, to understand gender equality better and the ways it can be implemented. It is necessary to provide support to Managing Authorities on how to implement the gender equality principle in the preparation of the calls for proposals, in project selection, and in the control and monitoring in all the Thematic Objectives and Investment Priorities covered by the ERDF and ESF. To this end, most stakeholders underline the importance of supporting networking and dissemination of practices at both the EU and national levels. As underlined in the Spanish report, improvements in communication actions on the results of operations in terms of gender equality and dissemination of good practices are essential to make measures credible and changes sustainable.

- **Develop gender-related concrete tools and guidelines as well as training programmes** for all Cohesion Policy stakeholders. These need to be tailored to the specific policy domains addressed, with examples of how to implement a gender perspective. This should increase awareness of the need to adopt a gender perspective in all programmes, and to have the concrete tools to make it easier to implement. Aspects that should be reinforced through the development of national guidelines and support are:
  
  - specialised Technical Assistance;
  - the development and distribution of guidance tools;
o exchange of knowledge and practices;
o the promotion of awareness-raising measures on the importance of gender mainstreaming for smart, inclusive and sustainable growth.

There are already many tools available that could be adopted to support the implementation of the gender perspective in Cohesion Policy, e.g. gender budgeting, Gender Impact Assessment, gender-relevant and gender-sensitive monitoring and evaluation tools. These tools could be adopted and adapted to support gender mainstreaming in implementing bodies and project operators. As underlined by the Swedish interviewees, even if people are aware of gender mainstreaming, standardised and continuous training is needed to ensure equal assessment procedures and support to project owners. In addition, concrete and standardised tools and methods have to be developed for the monitoring and evaluation processes, including additional quantitative indicators not only focusing on the number of participated/targeted men or women.

- Ensure the **involvement of gender equality bodies and organisations in all programme phases**, in order to guarantee a better alignment between the implemented actions and the needs of women. The institutional framework of gender equality needs to be consolidated in Cohesion Policy by strengthening **the gender equality coordination and support bodies** in all the policy domains. The German and Spanish experience, with the creation of gender equality bodies coordinating and supporting gender mainstreaming in all funds, provides useful indications in this respect.

- Closely **monitor and evaluate the implementation of the gender equality measures envisaged in Cohesion Policy Operational Programmes**, to avoid the downgrading of gender equality measures in the implementation phase. The creation of permanent national structures providing technical support for gender mainstreaming in the planning and implementation stages of all funds is essential, as shown by the Spanish and German cases. Special attention should be given to measures supporting investments in educational, social and healthcare services. These are facing reductions in public funding at the national and local levels due to the crisis, and deficit reduction strategies.

- Ensure a **strong political commitment** to gender equality at EU and national levels. This is identified by stakeholders as crucial in order to mainstream the attention and commitment of national and local stakeholders, rather than have them view it as another unwelcome requirement. As underlined by the Swedish stakeholders, it is necessary that **political attention and prioritisation of gender equality** are maintained through a systematic and continuous process. For this, the interviewed stakeholders underline that attention to gender equality at the EU level is key, because the European level could play a positive role in convincing the national government of the benefits from having a gender equality perspective. In addition, **awareness-raising and communication actions** aimed at achieving a stronger political commitment at different governance levels is essential for the new programming period. This needs to include the communication of results of operations in terms of gender equality, to make measures credible and changes sustainable and widely spread in all OPs.
REFERENCES


• European Commission, (2008), ‘Study to assess the feasibility and options for the introduction of elements of gender budgeting into the EU budgetary process’, DG Budget, Specific contract ABAC 132007.


ANNEXES
The two annexes have been attached separately

ANNEX A
A.1  Additional tables to Chapter 2
A.2  Additional Tables to Chapter 3
A.3  Additional Tables to Chapter 4
A.4  List of stakeholders interviewed in the country case studies
A.5  Web survey questionnaire

ANNEX B  Country case studies
The study analyses how the gender dimension and the principle of gender equality are taken into account in the EU Cohesion Policy 2014-2020. The aim is to provide inputs for the discussion on how to improve the promotion of gender equality and non-discrimination in the post-2020 programming period. In detail, the study considers how gender equality has been mainstreamed in ESF and ERDF in the programming, implementation, and monitoring phases with focus on eight selected country case studies. It also provides an assessment of the present and future challenges together with policy indications from relevant stakeholders at both European and national level.