



The Swedish
ESF Council

Short version for ESF in Sweden:

The European Standard on Gender Mainstreaming within the European Social Fund

– an instrument for everyone working
with ESF – in planning, programming,
implementation or monitoring at national,
regional or local level.



EUROPEAN UNION
European Social Fund







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Introduction

Gender mainstreaming shall be incorporated into all work within the European Social Fund (ESF) during the programme period 2014–2020. This will improve the quality of policy documents, working methods and planning, both in public authorities and projects, thereby contributing to improved quality throughout programme implementation. For gender mainstreaming within the Social Fund to have this effect, a systematic course of action is needed at all levels. The Swedish ESF Council is making it possible for projects, through gender mainstreaming, to better contribute to the fulfilment of programmatic goals, labour policy objectives and gender-equality objectives. The following project case show how this can be done.

How gender equality can improve results

The ESF-project “Pilot project for occupational health services in Jämtland Province” is an example of gender mainstreaming within projects from the previous period. Wanting to reduce staff sickness rates and reduce illness in the municipality, the town of Krokom (Sweden) applied for ESF funding. The problem analysis showed that absence due to illness in the municipality was above the national average (10.5% compared to 7.2%).

Because ESF made gender mainstreaming a requirement, a gender-equality analysis was conducted. It found that women’s sick leave was twice as high as for men (11.9% compared to 5.8%). Further, rehabilitation measures were more expensive for men than women.

Based on the analysis, the goal was set to reduce absence due to illness, but also to reduce the differences between women and men, as well as to distribute resources for rehabilitation more equally. The primary health care service, social insurance office and employment office collaborated on the project. The services that were implemented – rehabilitation programmes, management training, health representatives and a local occupational health coordinator – were procured





subject to the requirement that providers should possess gender competence. All activities and locations should also be accessible for everyone, regardless of native language or disability.

Project activities were monitored with the help of an evaluator with gender competence from a regional university.

The project resulted in increased work capacity for 40% of participants. Krokrom has succeeded better than most municipalities in the country at reducing absence due to illness. The difference in sickness rates between women and men has sunk by nearly 3%. The municipality has also improved its procedures for rehabilitation. A contractor whose bid was rejected due to the gender-competence requirement sued the municipality, leading to a hearing in the county administrative court. Krokrom won, and the gender-competence requirement has now been incorporated into the municipal procurement policy.

This project case shows how gender mainstreaming can contribute to better analysis, implementation and outcomes in project work. In the same way, gender mainstreaming can lead to better quality in the work within ESF.

Why set a minimum standard for gender mainstreaming?

Promoting gender equality within the European Social Fund is a “shall” requirement during this period. [1] This means that gender equality shall be a part of all activities, from the preparation of programmes to the implementation of projects. The Standard for gender mainstreaming, which describes how this can be carried out in practice, is based on the experiences of several Member States.

The Standard is meant for everyone working with ESF – in planning, programming, implementation, monitoring or evaluation at national, regional or local level. It shall provide guidance to staff at the managing authority and to those applying for project funds. It is an important aid for the managing authority's directors, because gender equality can best be implemented when the directors place demands and monitor compliance.

Incorporating a gender perspective into an organisation requires a systematic approach, as in all work with quality development. The





Standard is an instrument that systematically shows how to “do” gender equality in relation to all the Fund’s processes – from the drafting of policy documents at EU level to the implementation of the project.

The original European Standard was developed by and for the European Social Fund with financing from the EU Commission (DG Employment). Under the direction of the ESF Council in Sweden, the ESF bodies of 13 EU member states developed the European Standard in the network Gender CoP. [2]

This is a Swedish version of the Standard, produced for the Social Fund and developed by the Swedish ESF Council. This version is adapted to Swedish conditions, and is revised and abridged. It also includes various checklists for evaluating programmes and projects. The Standard can similarly be applied to two other horizontal principles: non-discrimination and accessibility. This has been elaborated upon in three thematic examples for the target groups youth, immigrants and business owners, which are included with the Standard as an appendix (in Swedish only).

The Standard shows how gender equality should be integrated into all parts of the structural funds. In practice, the processes have not always proceeded in such a systematic fashion. However the Standard offers guidance for how things should be done in the ongoing work.

Why gender equality in ESF?

Gender equality is viewed as a fundamental right at EU level. For ESF, gender equality is largely a question of quality and efficiency. The Social Fund’s resources shall be used as effectively as possible for the entire population.

Gender equality is also a question of justice – funds shall be distributed in such a way that both women and men benefit. Discrimination on the basis of gender shall cease. To be able to contribute to the objectives of the EU 2020 strategy and meet the predicted demographic challenges, in-depth understanding is needed of areas to be changed and outcomes to be achieved with the help of ESF funding. Gender equality is increasingly recognized as a key for reaching EU targets for growth, employment and social inclusion. Because inequality is a cau-





se of many of the problems that the Social Fund shall contribute to solving, a gender-equality perspective must be present in socio-economic analyses, objectives and indicators that guide how the Fund is used, monitored, and evaluated.

Inequality is visible in Sweden, for example in its highly gender-segregated labour market where women are overrepresented in low-paying, often part-time occupations, and are underrepresented in decision-making positions. Women have higher levels of stress at work and are absent due to illness more often than men. Women and men start businesses to differing degrees, and within different sectors. Women work more unpaid hours in the home than men. Boys do not attend, or drop out of upper-secondary education more than girls, and on average have lower grades than girls. Stereotypes limit both men and women and create a gender-segregated labour market. It is therefore important to promote gender equality in all projects to break gender stereotypes, make use of everyone's resources and create a sustainable work environment that can be reconciled with family life. Gender equality can help more well-educated women and men remain in their home towns and find jobs that correspond to the qualifications. It can lead to a healthier workforce and greater breadth in recruitment. Gender equality can also give employers better access to qualified personnel through a broader selection of candidates. Gender equality implies that both men and women view education as a natural entrance to the workforce.

How is the Standard organised?

ESF's activities proceed in seven-year cycles. Within this period, ESF's work can be divided into four levels: EU level, National Level, Implementation Phase and Project Level. The Standard shows how gender equality can be integrated at each level. Each level consists of five stages that make up ESF's operational procedure. The first stage is to analyse the area to be affected, which should include a gender analysis. The next stage is to set objectives and indicators for gender equality. After this come the implementation, monitoring and evaluation stages, all of which should be gender mainstreamed. In addition to these five stages, the Standard describes the gender competence





required to carry out the work. Hence gender mainstreaming takes place within ESF's regular activities.

Briefly put, the section on *EU level* describes how policy documents at EU level create opportunities for the funds to contribute to gender equality. At *the national level*, cohesion policy objectives are translated into a Partnership Agreement and an Operational Programme incorporating gender equality. In *the implementation phase*, objectives and policy documents are reworked to prepare activities financed by the funds. This involves describing how action plans, calls for applications, guidelines, and communication with project owners all contribute to gender equality. At *the project level* it is described how projects can be gender mainstreamed as a result of the preparations in the previous sections. For simplicity's sake we begin with the project level and then move up to the higher levels. In reality the process proceeds in the opposite direction: from the highest level down to the projects.

Gender equality and gender objectives

Gender equality means that structures and decision-making processes neither privilege nor discriminate women or men. When it comes to gender equality, Sweden's overall national goal is for women and men to have the same power to shape society and their own lives. The four partial objectives are as follows:

- Equal division of power and influence. Women and men shall have the same rights and opportunities to be active citizens and shape the conditions for decision-making.
- Equal economic opportunity. Women and men shall have the same opportunities and conditions in education and paid employment leading to lifelong economic independence.
- Equal division of unpaid work in the home and care. Women and men shall take equal responsibility for work in the home and have opportunities to give and receive care on equal terms.
- Men's violence against women shall cease. Women and men shall have the same rights and opportunities to physical integrity. [3]





This implies that women and men participate fully in all areas, in their private lives and in society. Gender equality means more than just treating women and men the same and giving them equal opportunities; there should also be an equal division of power and resources, and shared responsibility between women and men in society.

What is gender mainstreaming?

Legislation is crucial for achieving gender equality, but is not sufficient for creating change. Therefore, since the mid 1990s the EU Commission has adopted a dual strategy in its work for gender equality: gender mainstreaming and specific measures. [4]

Specific measures to benefit underrepresented or disadvantaged genders aim to directly reduce inequality – concerning such things as pay gaps, representation of women in decision-making positions, or paternal leave – through tailored interventions.

Gender mainstreaming, on the other hand, is a comprehensive and systematic means of incorporating a gender perspective into all areas of activity and forms of praxis at all levels, and applies to everyone involved. It is a complement to specific measures but cannot replace them. Gender equality must be a part of all activities, not something separate on the side. This also means that all public employees shall adopt a gender perspective in their daily work; it is not just a question for experts. Gender mainstreaming is the primary strategy of the EU and the Swedish government for fulfilling their gender-equality policy goals.

Within ESF, gender mainstreaming means that all work performed should take a gender perspective into account.

The funds shall also work with specific measures for particular (underrepresented or disadvantaged) groups. This means that projects falling within programme goals or priorities can contain or be designed as specific investments for equality. Specific measures are a way to directly change an unfair situation, while gender mainstreaming aims to identify patterns of gender inequality while preventing new ones from forming in the long term.







1. Project Level

Projects financed by any of the EU's structural funds shall, according to the policy documents, work with gender mainstreaming. [5] Below you can read how projects can “do” gender mainstreaming step by step, the expected results and what sorts of competence are needed to carry out the work.

Some projects primarily focus on contributing to gender equality, for example by reducing gender segregation in the labour market. Such projects are not automatically gender mainstreamed, and can also benefit from following the steps below.

Analysis

For a project to contribute to achieving the EU-2020 objectives for inclusive growth, it is necessary to have detailed knowledge about the problems that the project aims to affect. A gender-equality analysis reveals gaps between men's and women's situations, within or outside the labour market, and identifies their causes. It makes projects more efficient and enables them to carry out activities that satisfy the target group's needs, problems and expectations. The project must also be aware of differences in needs and living conditions *within* the target groups.

Calls for applications for funding shall include a background analysis that links the call to Sweden's goals within the areas of gender equality, employment, and regional/rural policy. The analysis shall describe the causes and effects of gender-equality issues for target groups. Describing the causes of inequality makes it possible to set relevant goals and decide what sorts of activities can contribute to change. With the help of internal experts or gender-experts provided by the support structure, projects should describe their core activities in terms of a gender perspective. (See the appendix with thematic examples for youth, immigrants and business owners.)





A gender-equality analysis should include the following steps:

Use gender-disaggregated statistics to make the target group's situation visible.

Gather data that describes the target group divided into women and men (education levels, employment in different sectors, business owners in various branches, having broken off studies, pay levels, etc.). It is important that gender is used as an overall variable, i.e. that every target group, such as youth, immigrants or persons with disabilities, is broken down by gender. Is there data describing discrimination according to age, ethnic background, disability and so on? If so, link the identified gender pattern to national or regional gender-equality goals.

Build on pre-existing knowledge. Find out what is already known about the situation you want to influence. Make use of available research, studies or reports that describe the target group's situation in terms of gender-equality. Listen to the target group and make use of their knowledge; the same goes for actors with competence in the field. If there is a lack of data on the target group broken down by gender, it may be a good idea to make plans for gathering data in the project's pre-study.

What is the context like for the target group? What resources are available to the target group. Are they different for women and men? Are they different for other groups? What differences and patterns are there between women and men in the branch or area where the project will be operating. Norms and expectations about what women and men should be and do have an effect. High unemployment among men in a municipality, despite vacant jobs in health care, can be an example of how norms and attitudes contribute to our gender-segregated education and labour sectors. Norms and attitudes manifest themselves in concrete resources – for example, do male and female business owners have equal access to support in the area where the project is operating?

What are the causes of the current situation? When target group's situation is clearly described, and the differences between men and women are understood, investigate and describe what they are based on. What consequences do the differences have for target group, labour market, and the project? Link the identified gender patterns to national and regional gender goals. How do the patterns affect the possibility of achieving the Social Fund's programmatic objectives.





Recommended methods of analysis

Method 4 R is recommended for gender-equality analysis. The four R's stand for Representation, Resources, Reality, and Realise. Read more at www.jamstall.nu. Another method can be SWOT.

Objectives and indicators

Based on the differences and issues identified in the gender analysis, the project should set objectives and indicators. The project's gender-equality objectives should show how the project contributes to equality within the project's focus area. It should be possible to connect the objectives to national and/or regional gender-equality goals. At the same time as the project sets specific gender objectives, all other project objectives and indicators should have a gender dimension. The gender objectives should help make the programme goals easier to reach.

Objectives are about what the project wishes to achieve, what level of participation or what impact the project is striving for. An example of an objective could be that a project has observed that only 20 per cent of participants in municipal occupational training for long-term unemployed youth are women and sets the objective of raising participation to 45 per cent.

Indicators are measures that the objectives are being reached. An indicator for the project above is the proportion of young women/men who participate in the training. Other indicators can be how many young women/men who complete/drop out of the training, or how many young women/men go on to further education, internships, or jobs. Such quantitative indicators can be supplemented by qualitative ones, for instance how women/men perceive the quality of the support offered, whether their motivation to study has increased, etc.

The project should also have a plan for how to monitor the objectives and indicators.





Implementing the project

Once the project has carried out a gender-equality analysis and set objectives accordingly, it has a good basis for determining what activities will contribute to reaching the gender-equality objectives. If the analysis reveals that fewer young men than women participate in a programme to attract more people to education, what is the reason? If the goal is for more young men to participate in the programme, what methods can get them to do so? The analysis by the project *Unga In* (Youth In) showed that fewer young women who were not in contact with established channels of support participated in supportive activities for young people. So the project chose to do its recruiting and networking via, for example, youth clinics, and met young people in public at cafes or other neutral locations. This, together with efforts to get parents to encourage the young girls to come to the project, has led to more young girls taking part in *Unga In*.

The outcomes and results that the project aims to achieve shall be related to programmatic goals, national and regional gender-equality goals, and the programme's gender-equality goals.

How the project is led and managed shall also be described from a gender-equality perspective. Those who lead the project or work within it need access to experts on gender-mainstreaming. For more on this, see the section on gender-competence.

All activities that are implemented are accompanied by a budget. How are project resources divided between women and men? Have sufficient resources been allocated to be able to provide training and perform specific gender-equality interventions?

When procuring expert services (from educators, consultants, evaluators, etc.), gender-competence should be a selection criterion.





Monitoring the project

How can projects ensure that their activities always have a gender-equality dimension? Situation reports and final reports from managing authorities must include assessments with a clear gender-equality component. For their part, the project leadership must explain how the project's objectives and indicators are evaluated in terms of gender equality.

A project run by the organization Communicare developed a "satisfied participant index" for project participants. In it, all data was presented in gender-segregated form, and it also had specific questions to reflect gender equality. Participants were asked whether they thought girls and boys received equal support, attention, and time in the activities, and whether sexist or degrading comments or jokes were uttered during meetings. The surveys were conducted once a month and served as data points when monitoring the project's goal of providing gender-equal support to participants.

If objectives aren't reached, project strategies and working methods need to be changed. The project needs to improve its strategies or revise its objectives, and continue working towards its goals with a gender dimension in mind.

Evaluating the project

Projects shall be evaluated to determine whether and to what extent gender-equality goals have been met. The project shall also be evaluated to ascertain whether a gender-analysis has been carried out, gender-equality objectives and indicators have been set, and interventions have contributed to reducing inequality.

Managing authorities shall require projects to make use of evaluators with gender competence. By means of such competence, an evaluator contributes to making the project more effective. If the evaluator lacks such competence it will not be possible to determine what works and what doesn't work for different target groups. When procuring services, it should be made clear that the evaluator shall evaluate what results and outcomes that the project's activities have led to in relation to the project's gender-equality objectives.





Some of the issues to investigate when carrying out the evaluation are as follows:

- Did the project meet the specific needs and priorities of both men and women? Were such needs and issues identified in analysis and planning? Were gender-disaggregated statistics available and were they used? Were gender-specific objectives set?
- To what extent were gender-equality objectives reached? Did the project reach the objectives partially or completely? Why or why not? What were the success factors? What were the obstacles? How have project activities advanced (or failed to advance) gender equality? Have all components and processes in the project been gender mainstreamed? Was the progress of the project compared with the gender-equality objectives at project leader meetings? Was gender-awareness training provided?
- When it comes to the budget – was there a specific budget that took into account how resources are divided between women and men? How much money was allocated to women/men?
- When it comes to leadership – were both women and men involved in the design and carrying out of the project? Were systems in place to monitor and evaluate gender equality? Were key persons (project owners, management group, trainers, employers, others) aware of the importance of integrating gender equality into their work? Did they receive any training in this?



What forms of gender-competence do projects need?

Gender-competence is crucial to successful implementation of the projects. All parties involved in implementing a project need gender-competence to integrate a gender dimension into their work, from analysis, planning and goal-setting to implementation and evaluation.

The task of working with gender equality should not be delegated to a single person alone – even if it can be a good idea for someone to have the main responsibility for gender equality. This also helps prevent competence from disappearing when the project is completed. The project needs to create structures whereby project workers jointly learn and develop methods for working with gender equality.

An initial stage in project planning can be to perform a needs assessment of forms of training for project leaders, employees, and even target groups. There are many ways to improve employees' competence, from brief classes to more long-term processes in which employees and the organisation as a whole develop. Both evaluators and those monitoring the project need competence in gender equality. It is a good idea for each project to develop a capacity-building plan based on the needs assessment.



Checklist for projects

1. A gender-equality analysis is included in the problem description.
2. Gender patterns are described with quantitative and qualitative data.
3. The causes of gender patterns are described.
4. The analysis is based on the programmatic objectives as well as national or regional gender-equality goals.
5. The project has enunciated its own gender-equality objectives that show how the project contributes to promoting gender equality within its own focus area.
6. The objectives should also help the project better achieve its programmatic goals.
7. The project's gender-equality objectives are linked to gender-equality goals in the programme or national or regional gender-equality goals.
8. The project's own gender-equality objectives address the problems identified in the gender-equality analysis.
9. The project has defined indicators to be able to monitor progress toward its objectives. (What results does the project want to achieve? What longer-term outcomes?)
10. There is logical coherence between gender-equality analysis, gender-equality objectives, the project's expected results and outcomes, and planned activities. Are specific activities planned to solved problems of gender inequality?
11. Gender-equality competence is available, internally or externally, within the project.
12. The budget clearly indicates how project resources will be divided between women and men.
13. The project application describes how the results of the work with gender mainstreaming contribute to the project's expected results and outcomes.
14. The project describes how the results of the work with gender mainstreaming will be reported in situation reports and final reports.





15. There is a description of how goals/results/outcomes shall be monitored internally and remedied if they don't go according to plan.
16. The project describes how goals, results and outcomes for gender equality will be externally evaluated.
17. The project states that they require evaluators to possess competence in gender studies and have practical experience of working with gender mainstreaming.
18. Competence in gender studies and practical experience of gender mainstreaming are available to the project, internally or externally, for example through the support structure.
19. In procuring services such as training and evaluation, bidders will be required to have gender competence.







2. Implementation

In the implementation phase, the programme documents [6] are “translated” into strategies for implementing the programmes nationally and regionally in Sweden. This is done by drafting national and regional action plans, but also through calls for applications and other activities through which the programmes are implemented. To reach the goals set out in the national programming phase, activities shall be undertaken that are financed under the funds’ thematic priorities and investment priorities.

Analysis

The implementation phase begins with an analysis of thematic areas. For interventions to be effective, every area must be analysed with respect to differences between women and men in all affected groups. In the gender-equality analysis, only gender-disaggregated statistics shall be used. The analysis should describe differences within the relevant area (aspects of gender equality for youth, the poor, business owners, urban and rural dwellers, etc. See appendix for thematic examples.) but should also describe causes and effects of inequality. The analysis shall be linked to national and regional gender-equality goals, and also to the EU gender-equality goals. A gender-equality analysis is a precondition for being able to formulate qualitative and quantitative gender-equality objectives for the programme, and being able to reduce gender differences.

Objectives

Based on the results that emerge from the analysis, objectives and indicators should be set, with qualitative and quantitative components. The most important problems identified in the analysis, and their causes, shall be reflected in the objectives and indicators set out in action plans and calls for applications. The objectives should match EU and national gender-equality goals.





The objectives should be premised on the different measures, and concern implementation, participation and effect on gender equality. A key question to answer is what the programme can and ought to contribute in terms of gender equality in the relevant areas.

Not only specific gender-equality objectives, but all objectives shall be examined from a gender perspective. A common misconception is that some objectives have nothing to do with gender equality. This is untrue because all objectives, and measures to reach them, can affect the situation for women and men. Some objectives can also reinforce stereotypes and gender patterns, for example measures for reconciling work and private life that are only offered to women.

Implementation

The actual implementation of programmes involves a number of activities. The managing authorities should issue calls for applications and provide information about the programme to the public and to project implementers. They should develop directives, handbooks, and guidelines. Application templates and assessment criteria should be developed. All these steps and documents must make it clear to project owners how they should “do” gender mainstreaming and implement specific actions in their work.

Calls for applications

All calls for applications should include a gender-equality analysis of the area concerned. In this way, the gender-equality aspects of the area that are relevant to the call are made visible. The call should also be linked to the goals of gender-equality policy. This is an important task if the project results are to be able to contribute to the programmatic goals.

Information to the public, directives and guidelines for project owners, and procurement of services

In all information about the programme it must be stated that gender mainstreaming is a “shall” requirement. It must be clear what that





obligation entails and what the consequences are of non-compliance. Project owners need to know that gender equality must be included in all stages of the project, from planning to evaluation. All documents, for example application templates, shall have gender-equality requirements clearly integrated throughout, and not as a separate section. Everyone seeking support, women and men of different ages, regardless of where they were born, should feel addressed by the informational materials that are developed.

Application documents and evaluation criteria

Application templates should help project owners to include gender equality in their submissions. It should clearly be stated that there is no such thing as a project that does not need to work with gender equality. Gender equality should be included in all parts of the application, not just in a separate section. Potential projects are evaluated by reviewing the answers in the application template. Selection criteria pertaining to gender mainstreaming shall be explicit and be included in all application documents. The consequences of not including gender equality should also be clearly stated. The evaluation criteria for projects can be found in the section Project Level.

Competence for project evaluation

To be able to evaluate projects, guidelines and competence are needed. All parts of applications and project descriptions shall be evaluated from a gender perspective. It is important that managing authorities decide at an early stage on selection criteria that include a gender perspective. The Standard contains a checklist, found in the section Project Level, indicating what demands should be placed.





Monitoring

The monitoring system shall ensure that all programme-related indicators also measure the specific gender-equality objectives set out in the programme or action plan. There shall be indicators that show whether projects' gender-equality objectives are being reached, and whether the programme's gender-equality goals are being achieved. Indicators shall be assessed regularly. If objectives are not being met, activities and plans must be modified.

All programme indicators shall be assembled and presented in gender-disaggregated form. They must also show age-distributions and clarify the situation to make it possible to understand effects of other grounds for discrimination, such as ethnicity and disability. They shall also show other relevant information, for example if a participant is unemployed or has insecure employment, has low or high education, etc.

Indicators shall be linked to the context or area of intervention, for example transition from school to work, local development and running a business.

Programme monitoring must show how gender mainstreaming is implemented within the programme. It should also make it possible to monitor the funding of specific actions to promote gender equality. It should make it possible to see how all undertakings within the programme contribute to advancing gender equality.

Monitoring templates should require projects to monitor their work to promote gender equality.





Evaluation

The evaluation of a programme, action plan or thematic priority should take account of gender equality at all stages and for all thematic areas. The evaluation should visualise all results, broken down by gender, age and other relevant categories to show the effects the work has had on gender equality. The evaluation should also show the extent to which gender mainstreaming is incorporated into structures, processes and thematic priority areas in the programme implementation. It should also assess the contribution of the programme to reaching gender-equality objectives. The evaluation should show if there is a framework, or on-location support to ensure that this is possible to achieve.

Competence

Those working with the planning, design and implementation of a programme from a gender perspective must have the requisite competence. They need to understand the meaning of gender equality, gender mainstreaming and the dual gender-equality approach, as well as how these things can be implemented. If capacity-building is needed, it should be supplied by experts, for instance from the gender support structure. In conducting the analysis, gender expertise is needed for the thematic areas, for example poverty, running a business, early school leavers, etc.





Checklist for programme implementation

1. Have gender analyses been done for all intervention areas?
2. Is the gender analysis linked to national, regional and EU gender-equality goals?
3. Have gender-equality objectives been formulated for the programme's specific intervention areas?
4. Are there specific gender-equality objectives, and are all objectives formulated in terms of a gender perspective?
5. Have gender-equality indicators been defined?
6. Is a system in place to ensure that information to the public and project implementers is gender mainstreamed?
7. Is there a system to ensure that calls for applications contain a gender dimension?
8. Are application templates gender mainstreamed?
9. Are there evaluation criteria for gender equality?
10. Is a monitoring system in place to ensure the monitoring of progress toward gender equality?
11. Is there an evaluation plan that makes it possible to assess the programme's contribution to reaching gender-equality objectives, and to evaluate the implementation of gender mainstreaming and the specific objectives?
12. Are evaluators required to possess gender competence?
13. Do authorities possess the necessary internal competence to realise the principle of gender equality?
14. Is there a plan for capacity-building when it comes to gender equality?
15. Is a support structure in place?



Checklist for evaluating regional plans

1. Does the plan agree with the national Operational Programme's goals, including gender-equality goals?
2. Does the socio-economic analysis include a gender-equality analysis?
Can a gender perspective be found throughout the socio-economic analysis for different groups of individuals and different branches?
3. Are conclusions drawn from the gender-equality analysis transformed into regional goals and priorities, both quantitative and qualitative?
4. How many of the regional goals, priorities and specific focus areas promote gender mainstreaming or equality?
5. Are the regional goals linked to national or regional gender-equality goals?
For example, is reference made to the provinces' strategies for gender mainstreaming or gender-equal growth?
6. Have planners had access to gender expertise in working with the analysis and setting of objectives?
7. Is it clearly stated how the gender-mainstreamed objectives shall be monitored and evaluated?
8. Are there indicators for gender-mainstreamed objectives? (All programme-related indicators should also measure the specific gender-equality objectives.)





3. National Level

In the Partnership Agreement [7] of 4 November 2014, the following can be read, which can be viewed partly as a common starting point for the ESI funds and partly as a specific mission for each fund:

The application of the concept of gender equality as a horizontal principle in the Social Fund programme should aim to create conditions for a sustainable working life for both women and men. A gender perspective is integrated into the programme through the choice of priorities and selection criteria. In interventions to strengthen individuals' position in the labour market, the analysis shall serve as a basis for utilising and developing both women's and men's competence in the projects. In project analysis, planning and implementation, it must be ensured that both women and men have access to interventions that, based on their personal capacities, increase their employability. The Social Fund programme also offers applicants an opportunity, based on a description of the project's target group and orientation, to carry out specific measures to advance gender equality.

The Social Fund shall, in accordance with Regulation No 1304/2013 of the EU Parliament and Council, promote equal condition for women and men in the labour market. Equality shall be promoted through its integration within all areas and through specific measures aiming to permanently increase women's and men's participation and solidify their position in the labour market, reduce gender discrimination in the labour market, combat gender stereotypes within education and make it easier for men and women to reconcile work and private life.

As previously mentioned, working with gender equality within the ESI funds is a "shall" requirement. In developing and implementing Operational Programmes, [8] gender equality shall be promoted through the integration of the equality principle in all areas. This also includes monitoring, reporting and evaluation. Specific measures within all investment priorities shall contribute to gender equality.

The most important programme instruments for the programming period 2014–2020 are the Partnership Agreement and the Operational Programme. This is where goals set at EU level are converted to the





national level. Below it is described how gender equality can be integrated into the work with the programme instruments. In this section too, the Standard serves as a recommendation for how the process best should take place. In reality, processes have been carried out in parallel, or in reverse order, or only in part. But when revising programmes or documents in the next period, the following can be viewed as the minimum acceptable standard.

Analysis

If the social fund is to be used as efficiently as possible for the entire population's benefit and the right priorities and goals are to be chosen, both women's and men's situations must be better understood. For this reason a gender-equality analysis should be included when the Partnership Agreement and Operational Programme are prepared.

In every investment area (e.g. transport, business, youth unemployment) the situation for both women and men should be described using gender-equality indicators such as differences between genders in terms of commute time, working hours, degree of business ownership, employment patterns, health and education. The analysis should also investigate the causes and effects of the differences. Performing the analysis requires gender competence and expertise. Organisations promoting gender equality or experts in the field who are members of the partnership can significantly contribute to the analysis. A socio-economic analysis and a SWOT shall be conducted from a gender perspective.

Socio-economic analysis

To identify differences and needs, and to justify the choices made, every Operational Programme (OP) is based on an ex-ante socio-economic analysis (SEA). [9] For the analysis to be accurate and relevant when it comes to how women and men are affected by the programme, it must be conducted from a gender-equality perspective. This means that:

- Gender-disaggregated statistics are gathered to make visible differences between women and men





- Gender-equality indicators are defined to be able to analyse differences in equal treatment between men and women
- Causes of the differences pointed to by the indicators should be analysed, as should their effects

Performing the analysis requires gender competence and expertise. If the SEA is contracted out, bidders should be required to be qualified to carry out a gender-equality analysis. The SWOT that is performed should also adopt a gender perspective and be conducted by persons with relevant competence.

Goals

Based on the analysis, gender-equality goals are formulated for the Partnership Agreement and Operational Programme. The goals direct the allocation of funds for the programming period 2014–2020. It is therefore important that the gender perspective be integrated into all goals. If the European or national goals for implementation of the Social Fund are not gender mainstreamed, gender-equality goals can still be worked into the programme instruments and national/regional level, before implementation begins.

The most important goals for the programme have accompanying indicators to measure implementation and development. The different indicators should exhibit a gender dimension when it comes to funds allocated for promoting gender equality (costs for specific measures and gender mainstreaming). They should also show results and outcomes, whether gender equality has increased, or whether the intervention instead has cemented inequalities in relation to the gender-equality goals. All indicators that touch on beneficiaries should always be broken down by gender. [10] It is not enough, however, merely to measure numbers of women and men. Gender should be used as a parent variable when it comes to other target groups. Indicators should also show, for example, how many women and men are unemployed/employed or have low/medium/high education, as well as show gender segregation in different occupations in the labour market.





Implementation

At the national policy level, the Partnership's and the Monitoring Committee's (MC) composition, the creation of a support structure, gender-equality specialists, and capacity-building in public authorities are crucial to the work with gender equality as a horizontal principle.

The Partnership should include actors responsible for advancing equality and non-discrimination to ensure that a gender perspective is included. Civil society organisations promoting gender equality shall also take part. In addition, support structures for gender equality can contribute support and competence.

In the **Monitoring Committee**, gender experts should help supervise the preparation of yearly progress reports and make suggestions for improvements. They contribute to keeping all members of the MC and evaluators updated on the work with gender equality in relation to the programme's results. In addition, all participants need to be offered training in gender-equality in the funds; the presence of gender-equality specialists is not enough.

Capacity-building for implementers. Implementing the Fund's work with gender equality as a horizontal principle is a part of the competence possessed by those who manage ESF. A plan should be in place for capacity-building among leaders and other personnel. Reinforcing administrative capacity is also about creating support structures to implement the programme's gender-equality strategy.

The Operational Programme (OP) of the Social Fund states that **support structures** shall be established to help implement the horizontal principle of gender equality. A support structure offers support for integrating gender equality into projects or within authorities, and also contributes to methods development. The support structure shall base its activities on the Standard and on the principle of gender equality, and offer support to programme developers, authorities and projects.





Monitoring

The monitoring system shall show the extent to which the programme contributes to increased equality between women and men in relation to the gender-equality goals. Does the funding help increase equality between women and men? Do women and men succeed to different degrees in different interventions. Do women and men receive unequal resources, and if so, why? The monitoring process shall generate proposals for new interventions or procedures to promote equality or improvements of existing interventions. Public officials working with evaluation shall ensure that gender equality continues to be a priority in the implementation of the OP.

Evaluation

Every Member State shall conduct a series of evaluations. [11] To be effective, these should incorporate gender equality, and the evaluators should possess gender competence. The **ex-ante evaluation** (preliminary evaluation) should determine whether planned investments to advance gender equality and prevent discrimination are sufficient. [12] the **ongoing evaluation** that is carried out should discuss both specific measures for increasing gender equality and how all programme activities have contributed to achieving gender-equality objectives. Focusing on gender equality throughout their work, **Ex-post evaluations** should investigate the outcomes and effectiveness of the funds, and how they have contributed to the EU strategy for smart, sustainable, and inclusive growth in accordance with the requirements placed on each fund.

Gender competence

Those who take part in the preparation, implementation, monitoring or evaluation of national and regional key programming documents need training in gender equality. Competence is needed to understand how inequality affects society and the economy, the role of gender equality in effective programme implementation, and what gender mainstreaming involves in programme implementation.





Checklist for the national policy level

1. Gender differences have been identified along with their underlying causes.
2. The analysis describes gender aspects of the intervention area, but also of structures and processes (budget issues, decision-making, etc.).
3. Gender equality is integrated into all phases of the analysis rather than in a separate section.
4. The SEA evaluates intervention outcomes for women and men in every part of the analysis.
5. The analysis takes up economic and social conditions for women and men (e.g. effects of the economic crisis on women and men, impact on access to resources, influence on the sharing of paid and unpaid labour).
6. It investigates the extent to which EU and national gender-equality goals have been achieved as well as obstacles to reaching them.
7. Specific objectives shall be set that reflect the inequalities identified in the socio-economic analysis.
8. All objectives must have a gender dimension. Consider:
 - What gender dimensions that must be taken into account. Objectives can mistakenly be viewed as gender neutral.
 - Whether the objectives reinforce inequality. For example, an intervention to promote reconciliation between work and private life that only focuses on women can reinforce stereotypes and gender roles in the workplace.
9. Measurable gender-equality indicators shall be in place to monitor progress towards the objectives.
10. The Partnership shall consist of actors responsible for promoting gender equality and non-discrimination, as well as gender-equality organisations from civil society.
11. The Monitoring Committee shall consist of parties responsible for promoting gender equality and non-discrimination, as well as gender-equality organisations from civil society.





12. Gender-equality training is planned for management and other personnel.
13. A support structure has been established to assist with implementation of the horizontal principle of gender equality. The support structure works in accordance with the Standard.
14. Annual reports and other reports and evaluations pertaining to the programme provide information about the status of specific investments for gender equality and gender mainstreaming.
15. In procuring ex-ante evaluations, ongoing evaluations, and ex-post evaluations, bidders shall be required to possess gender competence.





Ongoing Gender Inequalities in the EU

Despite progress made over the past decades, major gender inequalities still persist across the EU in a number of fields.

- In the labour market, women have lower rates of activity and employment than men. In 2013, the employment rate was for example 74.2% for men, compared to only 62.5% for women. [13]
- When they do work, and despite having higher average educational levels than men, women are more likely to be in low paid sectors and occupations, which reduces their economic independence.
- In 2012, women in the EU were earning on average 16% less than men, [14] with much larger gaps in some Member States.
- Reconciliation of work and private life remains a major problem for many women; only 65.6% of women with children under the age of 12 are in employment, as opposed to 90.3% of men. [15]

European Policy Framework for Promoting Gender Equality

Since its foundation, the European Union has implemented a series of legislative measures to promote gender equality. These have gradually been extended over the years, and now include some 15 European directives. [16] The Treaty of the European Union (2009) commits Member States to non-discrimination and equality between women and men (Articles 2 and 3). While legislative measures are crucial to underpinning any gender equality strategy, they are insufficient in themselves for achieving change.

The EU Dual Approach for gender equality is clearly in evidence in the gender-equality strategies adopted in recent years at European level. Based on the Roadmap for Equality between Men and Women 2006–2010, [17] the first Gender Equality Pact (2006) [18] and the Women's Charter, [19] a new five-year Strategy for Equality between Women and Men for the period 2010–2015 was adopted in 2010. [20] The strategy represents a comprehensive framework for actions to promote gender equality in the EU addressing five key priority areas. In addition, the European Council has concluded a new European Pact for Gender Equality (2011–2020). [21]





4. EU Level

Gender Equality in the ESI Funds

The Dual Approach of the European Union to promoting gender equality is also in evidence in the provisions governing the implementation of ESI Funds. Specific actions in favour of equality between women and men have been a clear focus in the European Social Fund since the 1970s. Since the late 1990s, there has been an obligation to promote gender equality in the implementation of all Structural Fund programmes. The new regulations for the ESI Funds for the programming period 2014–2020 reinforce this trend. They are based upon the new EU policies for gender equality, and require the promotion of gender equality through both gender mainstreaming and specific actions. [22] There are specific requirements to ensure that measures to promote gender equality are included in both the Partnership Agreements and Operational Programmes.

Gender Mainstreaming at the EU Level

All policy cycles in ESI Fund programming and implementation are mutually interdependent. However, the cycles are top-down processes, beginning with policy planning and implementation at European level. It is therefore essential that the European Commission include both gender mainstreaming and specific actions in planning and in the drafting of documents at the EU level. The gender perspective must be integrated into all stages of EU policy design and implementation, for example in preparing the CPR (Common Provisions Regulation) and the ESF Regulation, handbooks and checklists, and in setting the composition of the monitoring committee (ESF-Committee). The EU Commission must specify obligations and ensure capacity-building for all relevant actors. This provides a positive example, stimulating Member States' and regions' continuing efforts to promote gender



equality. The following points describe how gender mainstreaming can be accomplished at the EU level.

Analysis: All analyses carried out in preparation for ESI Funds must include an in-depth analysis of the gender perspective in order to provide a complete and accurate picture of the challenges which the Funds should address. If actions lack a gender perspective, there is a danger of their being “gender blind” or even reinforcing gender inequalities.

Objectives: ESI Fund objectives should include specific objectives for tackling gender inequalities. At the same time all objectives of the fund should be screened from a gender perspective. Specific objectives for gender equality can be found in the new ESF regulation [23] – “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”.

Implementation: EU policy processes must ensure that mechanisms and processes are established to ensure that gender mainstreaming takes place in practice and not only “on paper” through setting out requirements and monitoring their implementation. Among other things, EU policy documents should ensure that gender equality is a selection criterion for interventions receiving funding, that gender equality is integrated into monitoring and evaluation procedures, that advice and support on gender mainstreaming is available, and that gender-equality experts are represented on monitoring committees.

Monitoring and evaluation: It is essential that the gender perspective is built into monitoring and evaluation tools for the ESI Funds at EU level. Indicators should be set, allowing not only monitoring of the specific actions in favour of gender equality, but also the degree to which the gender perspective is being taken into account in all thematic fields. All statistical data shall be gender-disaggregated. All evaluation carried out at EU level shall include a special focus on actions to promote gender equality, as well as a thorough analysis of how gender-equality is integrated into all the Structural Fund’s programmes and procedures.





Gender Competence: Ensuring sustainable gender mainstreaming of work done at EU level requires capacity-building of all key actors in policy-making and monitoring of national implementation. Training, coaching and expert support are needed. Gender competence shall be present from the highest political decision-making level to the operational level.





Footnotes

1. As stated in Article 7 of CPR, in ESF Regulations, and the Partnership Agreement
2. www.gendercop.eu The complete European Standard is available at www.standard.gendercop.com
3. <http://www.regeringen.se/sb/d/2593/a/14257>
4. http://ec.europa.eu/justice/gender-equality/index_en.htm
5. [blank reference, marked in original text]
6. The National Reform programme EU KOM's recommendations for the National Reform Programme, Partnership Agreement, and National Operational Programme
7. <http://www.regeringen.se/content/1/c6/23/05/86/15e0beb7.pdf>
8. Article 7 in EU Regulation no. 1303/2013
9. A socio-economic analysis conducted before the programme is implemented to show how women and men may be impacted by the programme
10. ESF Regulation (COM(2011) 607 final): "All data are to be broken down by gender"
11. Common Provisions Regulation (Article 47)
12. The Regulation (Article 47)
13. Eurostat t2020_10,
http://epp.eurostat.ec.europa.eu/tgm/refreshTableAction.do?tab=table&plugin=1&pcode=t2020_10&language=en, accessed 11 September 2014
14. European Commission (2014), Tackling the Gender Pay Gap, available at http://ec.europa.eu/justice/gender-equality/files/gender_pay_gap/140319_gpg_en.pdf
15. European Commission, DG JUST website:
http://ec.europa.eu/justice/gender-equality/economic-independence/index_en.htm, accessed 11 September 2014
16. http://ec.europa.eu/justice/gender-equality/law/index_en.htm
17. http://europa.eu/legislation_summaries/employment_and_social_policy/equality_between_men_and_women/c10404_en.htm





18. http://www.consilium.europa.eu/ueDocs/cms_Data/docs/pressData/en/ec/89013.pdf
19. COM (2010) 78 final
(<http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:0078:FIN:EN:PDF>).
20. COM(2010) 491 final
(<http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:0491:FIN:EN:PDF>).
21. Council conclusions on the European Pact for Gender Equality for the period 2011–2020,
http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/lsa/119628.pdf
22. Regulation (EU) No 1303/2013 of the European Parliament and of the Council of 17 December 2013, Article 7
23. ESF Regulation, Article 7



The European Community of Practice on Gender Mainstreaming that produced the original Standard is a community dedicated to integrating the gender dimension into the European Social Fund (ESF) programmes (2014–2020) in relation to the EU 2020 strategy. The goal is that gender mainstreaming shall be an integral part of future ESF management – from planning, programming, implementing to monitoring and evaluation. The network is funded by the European Commission. Find out more on www.gendercop.eu

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