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**Mainstreaming Equal Opportunities For Women And
Men In Structural Fund Programmes And Projects**

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1. CHECKLIST ON THE MAINSTREAMING OF EQUAL OPPORTUNITIES IN STRUCTURAL FUND PLANS AND PROGRAMMES

This checklist summarises the principal requirements concerning the integration of equal opportunities between women and men in the European Structural Funds. It can be used to verify that the Plans and Programmes respect the relevant provisions in the General Regulation⁽¹⁾, and that the most important elements are in place to support the mainstreaming of equal opportunities in the management of assistance.

Requirements to be respected :	Yes	No
1. There is clear reference to the intention to ensure that the operations financed by the Funds will contribute to the elimination of inequalities and promote equality between men and women. (Articles 1 §2 & 12)		
2. There is a clear indication that the operations of the Funds will be consistent with Community policies and operations concerning equality between men and women. (Article 2 §5)		
3. There are quantified global objectives for the reduction of inequalities and promotion of equality between women and men for the Community Support Framework and/or Single Programming Document (Articles 16 §1, 17 §2, 18 §2, 19 §3).		
4. For Objective 3 plans and human resource frameworks, there is clear demonstration of their consistency with the aims and strategy concerning equal opportunities of the relevant national employment plan (Article 7 §3).		
5. There is clear indication of : - how the promotion of equality between men and women will be taken account of within the partnerships, and - which bodies responsible for the promotion of equality between men and women will be included in the partnerships (Article 8 §1).		
6. There is an indication of how the balanced participation of women and men will be achieved within the Monitoring Committees (Article 35 §1)		
7. Key monitoring indicators are broken down by sex (Article 36 §2), for example: - Labour market measures, activity rates, unemployment and employment; - Vocational education and training, skills and qualifications levels; - Business support services, enterprise creation and growth.		
8. An ex-ante evaluation of the situation in terms of equality between men and women is included, which covers (Article 41 §2c): - labour market opportunities and treatment at work; - the specific constraints to equality between men and women; - an estimate of the expected impact of the strategy and assistance, particularly on : the integration of women and men into the labour market; on education and vocational training; on the establishment of women in business; and on the reconciliation of family and working life.		
9. There is an indication of how the managing authority will ensure that bodies promoting equality between men and women will be informed about the opportunities offered by the Community assistance (Article 46 §2a).		
10. There are detailed objectives and quantified targets on equal opportunities between women and men for those priorities and measures that will contribute to improved gender equality (Article 18 §3).		
11. There is a clear outline of the arrangements for monitoring and evaluating equal opportunities between women and men at the appropriate levels (Art. 17 2d), 18 2d) 19 3d).		
12. There is an outline of how equal opportunities will be taken into account in the management and control arrangements for selecting and monitoring operations (Article 35 §3).		

2. MAINSTREAMING EQUAL OPPORTUNITIES IN THE STRUCTURAL FUNDS 2000-2006

2.1 Purpose of this document

The General Regulation on the Structural Funds for the period 2000-2006¹ contains substantially new features on the integration of equal opportunities for women and men. This Technical Document explains the formal requirements concerning the integration of equal opportunities for women and men in Structural Fund plans and programmes, and gives guidance on how these requirements can be implemented in practice during their development and implementation. It complements the Vademecum (Plans and programming documents for the Structural Funds 2000-2006) as well as the accompanying methodological Working Papers² produced by the European Commission.

2.2 Gender mainstreaming: a legal obligation

The provisions concerning equal opportunities in the General Regulation of the Structural Funds reflect important new obligations of the Treaty of Amsterdam. Articles 2 and 3 of the Treaty make “the elimination of inequalities and the promotion of equality between women and men” a central principle of Community policy and action. The approach to be taken to meeting this legal obligation is called “gender mainstreaming” (see Table 1 on following page).

The “mainstreaming” approach to equal opportunities in the Structural Funds aims to ensure sustained and integrated efforts to overcome the persistent inequalities between women and men that exist in all Member States. Although the scale of the disparities may vary, inequalities exist in relation to :

- rates of inactivity, unemployment and long-term unemployment;
- participation in full-time, part-time and atypical work;
- pay and conditions of employment;
- rates of enterprise creation and growth;
- access to transport and other services;
- sharing of unpaid domestic and family care work.

While some men may experience gender-related obstacles, it is women who are the most disadvantaged. Some groups of women experience particular difficulties, such as those caring for children and the elderly, and those living in remote or marginalised communities.

2.3 Contribution of gender equality to the objectives of the Structural Funds

The integration of equal opportunities in the Structural Funds is important not only for legal reasons. Overcoming the inequalities between women and men in the labour market contributes to the overall effectiveness of Structural Fund plans and programmes. Growth, competitiveness and employment can only be achieved through the fullest mobilisation of all citizens, male and female.

¹ Council Regulation (EC) N°1260/1999 of 21 June 1999 laying down general provisions on the Structural Funds, O.J.,26/6/99, L161/1.

² See Working Paper 2: The Ex-Ante Evaluation of Structural Funds interventions, in particular Annex 4, and also Working Paper 3: Indicators for Monitoring and Evaluation, fiche i. (<http://inforegio.cec.eu.int>)

There is a strong synergy between the objectives of the Structural Funds and equal opportunities between women and men. For example:

- Improved opportunities of participation of women and men at all levels of the labour market contribute to the efficiency and effectiveness of investments in human resources.
- Raising the vocational qualifications and skills of women contributes to improved productivity and chances of employment and promotion.
- Economic activities developed by women are often innovative responses to market opportunities and local needs.
- Improved transport and care services enable more women to access labour market opportunities, as well as creating new sources of jobs.

Table 1 : What is gender mainstreaming ?

«**Gender mainstreaming**» involves ensuring that all general measures and operations openly and actively take into account – during planning, implementation, monitoring and evaluation – their effects on the respective situations of women and men. It also involves the complementary design, implementation, monitoring and evaluation of specific measures and operations to promote equality and to assist women to participate and benefit equally.

Overall, plans and programmes should contribute to improved equality between men and women, and should be able to demonstrate this impact, prior to, during and after implementation.

Mainstreaming is different from previous approaches to equal opportunities in the Structural Funds, which have mainly involved the implementation of specific measures in favour of women. These are important, but cannot overcome the structural inequalities in the organisation of working and family life, which constrain the participation of many women in the labour market and in public life.

Women and men do not have the same roles, resources, needs and interests. They do not participate equally in decision-making. The values given to “women’s work” and “men’s work” are also not the same. These differences vary from one society or culture to another. They are termed “gender differences”.

Many policies and programmes are “blind” to these differences. As a result, services and infrastructures are not always designed with the needs of women in mind. This applies to the provision of public and private infrastructures and services, as well as to the more familiar areas of employment, training and enterprise.

3. WHAT CONTRIBUTION OF THE STRUCTURAL FUNDS TO EQUAL OPPORTUNITIES FOR WOMEN AND MEN ?

3.1 Setting objectives for equal opportunities

Several provisions in the General Regulation state the need to ensure that the Structural Funds contribute to Community objectives concerning equal opportunities for women and men. Community policy identifies five areas where it is particularly important to reduce inequalities and promote equality between women and men:

- Access to, and participation at all levels in, the labour market;
- Education and training, particularly concerning vocational skills and qualifications;
- Enterprise creation and growth;
- Reconciliation of work and family life;
- Balanced participation in decision-making.

The global objectives for equal opportunities at the level of a Community Support Framework, Single Programming Document or Operational Programme should specify the areas in which improvements are to be achieved and should identify the quantified targets to be achieved. More specific equality objectives might also be elaborated, such as improved pay and conditions of work for part-timers, improvement of the infrastructures of social and economic life or the professional status of assisting spouses in family businesses. Much will depend on the character of the Objective or Programme, as well as national or regional priorities.

Some illustrative examples of how Structural Fund measures and operations can contribute to improved equality between women and men are given in Table 2.

Table 2 : Some possible contributions of the Structural Funds to Gender Equality Objectives

<i>EQUALITY OBJECTIVE</i>	CONTRIBUTION OF THE STRUCTURAL FUNDS
<i>Improved access to, and participation at all levels, in labour market.</i>	<ul style="list-style-type: none"> • Improved participation of women in labour market measures leading to employment in technical professions; • Support to companies and organisations which develop and implement employment equality plans; • Support to companies to improve the qualifications and working conditions of part-time and atypical workers; • Improved access of women to employment opportunities through transport initiatives and care support; • Promotion of women as employees and managers in research and development, technology and innovation; • Promotion of men into service professions through training and labour market measures. • Measures to support the increased participation of women at all professional levels in growth sectors, such as tourism, environment, telecommunications and biotechnology.

<p><i>Improved equality in education and training, particularly in vocational skills and qualifications.</i></p>	<ul style="list-style-type: none"> • Improved participation of women in vocational training measures leading to technical qualifications and professions; • Improved participation of women in IT training courses particularly at higher levels; • Promotion of men’s participation in training measures leading to service sector employment; • Improved flexibility of delivery of education and vocational training measures to reach women in rural areas or without easy access to transport.
<p><i>Improved participation of women in enterprise creation and growth</i></p>	<ul style="list-style-type: none"> • Awareness-raising and training measures on equality for managers and advisors of enterprise support services; • Re-orientation and design of SME support services (financial and technical) to better meet the needs of women wishing to start and develop a business; • Improved financial services for women starting and developing businesses; • Support for networks and associations of women business owners, and for mentoring activities by and for women; • Special support to women to establish and develop businesses in telecommunications and high technology fields; • Support for women as promoters and managers of social economy initiatives.
<p><i>Reconciliation of work and family life</i></p>	<ul style="list-style-type: none"> • Support for the establishment of care services for children and other dependants and for the training and qualification of care workers; • Support to employers who offer their employees career breaks, childcare and other family support services; • Urban and environmental improvements that improve mobility, safety and security; • Improved access to training and job opportunities for women and men with restricted mobility, through support for teleworking or homeworking, and transport and care initiatives.
<p><i>Improved participation of women in decision-making.</i></p>	<ul style="list-style-type: none"> • Balanced participation of women and men in monitoring committees and partnerships responsible for managing Programming Documents. • Involvement of equality bodies and women’s organisations in monitoring committees, partnerships and other forum during the programming period. • Promotion of women into managerial and decision-making positions in the structures for managing assistance and implementing operations. • Regular consultation with organisations representing equality interests throughout the programming period. • Provision of information and support to women’s organisations and networks to encourage participation as project promoters.

3.2 Illustrating the contribution of Structural Fund Programmes to equal opportunities

A similar matrix as Table 2 could be elaborated by Member States or regions for Structural Fund programmes, to show the intended contribution of a Framework or Programme to equal opportunities.

One axis of the matrix presents the various fields of intervention or priorities, the other axis presents the principal objectives concerning equal opportunities for women and men. Details of the contribution of each field of intervention or priority to equal opportunities can then be given in the relevant box.

If the financial weight of the priority is also included, an indication of the resources to be allocated to equal opportunities can be obtained. This may be useful for monitoring the mainstreaming of equal opportunities in Programmes.

Table 3: Example of a matrix to demonstrate how Structural Fund interventions will contribute to equal opportunities between women and men

	Reduced inequalities and improved equality between women and men in:			
	Labour market	Education and training	Enterprise creation and growth	Reconciliation of work and family life
Priority 1 : SME and private sector development				
Priority 2: tourism				
Priority 3: human resources				
Priority 4: transport infrastructure				
Priority 5: Research and technology				

4. INTEGRATING EQUAL OPPORTUNITIES IN THE DEVELOPMENT OF PLANS AND DOCUMENTS

Equal opportunities is one of the factors ensuring the relevance and effectiveness of Structural Fund operations. The comprehensiveness and coherence of the information provided on equal opportunities are important criteria in assessing the quality of a Structural Fund Plan.

This chapter indicates the information that should be provided in Plans for Community Support Frameworks (CSF), Single Programming Documents (SPD) and Operational Programmes (OP) to meet the provisions of the General Regulation on the Structural Funds. It also gives suggestions for additional information that will help to mainstream equal opportunities in the management and implementation of Structural Fund interventions.

4.1 Plans for Community Support Frameworks or Single Programming Documents

Integrating equal opportunities into the plans of CSFs or SPDs is the first major step in ensuring that the requirements of the General Regulation are met. The plans will be assessed for their relevance, effectiveness and quality; one part of this assessment will concern the treatment of equal opportunities. The following checklist indicates the useful information on equal opportunities to include in the plan of a CSF or SPD.

Table 4: Information to be contained in a Community Support Framework or Single Programming Document

GENERAL INFORMATION ³	INFORMATION ON EQUAL OPPORTUNITIES
Quantified description of the current situation with regard to disparities in terms of income and employment, infrastructure gaps, etc. and potential for development (Obj.1) or conversion (Obj.2).	<ul style="list-style-type: none"> • Sex-disaggregated data and information wherever possible, particularly concerning: activity and inactivity rates, unemployment and long-term unemployment, vertical and horizontal participation in the labour market (see glossary for definitions), and enterprise creation and growth. • The situation in terms of equality between women and men in labour market programmes and in vocational training and qualifications, as well as current levels of service provision relevant to equal opportunities (care services for children and the elderly, transport, etc.).
A description of an appropriate strategy and the priorities selected to attain the Objective concerned.	<ul style="list-style-type: none"> • A description of the objectives on reduced inequalities and improved equality between women and men, particularly in employment, education and training, enterprise and reconciliation of work and family life. • A description of how the choice of priorities and measures will contribute to the equality objectives.

³ From checklist of minimum information to be contained in a CSF or SPD plan for it to be considered admissible by the European Commission. Source: Vademecum: Plans and programming documents for the Structural Funds 2000-2006 <<http://inforegio.cec.eu.int>>

General information to be provided in the CSF or SPD plan, cont.	Information on equal opportunities to be included, cont.
A Frame of Reference for Objective 2 Plans for the national human resource strategy; a demonstration that Plans submitted under Objs.1 and 2 are consistent with the national human resources strategy as described in the Obj.3 Frame of Reference, and with the strategy of employment and the development of human resources in the Member State concerned, especially the National Action Plan.	<ul style="list-style-type: none"> • Demonstration that the plans are consistent with the fourth pillar of the employment strategy on equality between women and men, and with the equal opportunities priorities expressed in the National Action Plan.
Account take of indicative Commission guidance.	<ul style="list-style-type: none"> • Account taken of any Commission guidance on equal opportunities.
An integrated ex-ante evaluation, including the labour market situation, environmental situation and the position concerning equal opportunities between men and women.	<ul style="list-style-type: none"> • A description of the opportunities and constraints concerning equal opportunities for women and men in the labour market, education, training and enterprise • An assessment of the potential impact of the plan on reduced inequalities and improved equality between women and men. <p><i>See section 4.2 below for more details.</i></p>
Appropriate indicators and targets.	<ul style="list-style-type: none"> • Presentation of the specific indicators and targets for monitoring improved equality between women and men. • General use of sex-disaggregated indicators wherever feasible.
Consistency demonstrated with other Community policies.	<ul style="list-style-type: none"> • Consistency demonstrated with other regional, national and Community policies on equal opportunities between women and men.
An account of the steps taken to consult the partners and the arrangements and provisions for their involvement in the Monitoring Committee.	<ul style="list-style-type: none"> • An account of steps taken to consult bodies promoting equal opportunities and to ensure equal representation of women's and men's needs and interests in development of the plan. • An account of the arrangements taken to ensure attention to equal opportunities in programme committees and partnerships, such as representation of equality bodies and balanced participation of women and men.
An outline of the arrangements for monitoring and evaluation.	<ul style="list-style-type: none"> • An outline of the specific arrangements for monitoring and evaluating equal opportunities, such as collection of sex-disaggregated data and commissioning of specific studies.
Publicity actions.	<ul style="list-style-type: none"> • An indication of the measures to be taken to inform organisations and groups involved in equality issues and to publicise the plans and programmes to women and men among the populations concerned.

4.2 Ex-ante evaluation of equality between women and men

For the preparation of plans an ex-ante evaluation must be undertaken. According to the General Regulation (Article 41 §2c), this shall take into account equality between men and women. It shall also include a specific ex-ante evaluation of the situation in terms of equality between men and women. This should cover: the labour market opportunities and treatment at work, including the specific constraints on each group; and an estimate of the expected impact of the strategy and assistance, on the integration of women and men into the labour market, on education and vocational training, on the establishment of women in business and on the reconciliation of family and working life.

The following is an indication of what might be included in an ex-ante evaluation of equality between women and men. This is not exhaustive and other important issues – of particular relevance to the Member State, region or economic sector – may also be included. Both quantitative and qualitative information will be required.

Table 5: Information to be included In an ex-ante evaluation of Equality between Women and Men

	Suggested information to be included:
Opportunities to improve equality between men and women	<ul style="list-style-type: none"> • Differences in qualifications and skills between women and men – in and out of the labour market – and how these relate to current and future labour market demand. Opportunities for improving women’s skills and qualifications. • The participation of women and men in different sectors and professions of the labour market, and opportunities for participating in decision-making and management positions and in sectors or branches where participation is unbalanced. • The opportunities to reconcile family and working life, such as the existence of caring services for children and the elderly and other measures being taken to improve the reconciliation of family and working life for women and men. • Positive experiences of previous strategies and measures to improve equal opportunities for women and men might be explained here, including mention of how the lessons will be taken into account in the future programme.
Constraints on the full participation of women and men in the labour market	<ul style="list-style-type: none"> • The reasons for any disparities in qualifications and skills levels between women and men and obstacles to improving qualifications and skills; • The obstacles faced by unemployed and inactive women and men in obtaining and sustaining employment; • The obstacles to the recruitment and promotion of women into higher-level professions and into positions of management and decision-making; • The reasons for low business start-up rates by women and identification of constraints to the growth and profitability of women’s businesses; • The specific constraints to labour market participation experienced by particularly disadvantaged groups of women or men, such as those caring alone for children or elderly dependants, women in disadvantaged urban communities and remote rural areas, migrant or ethnic minority women, etc.

<p>The likely impact of the strategy and assistance on improved equality between women and men</p>	<ul style="list-style-type: none"> • An estimation of the likely impact of the proposed strategy and assistance on reduced disparities and improved equality between women and men, in particular concerning : <ul style="list-style-type: none"> - Improved equality of participation in the labour market (vertically and horizontally); - Improved equality in education and vocational training, and in the qualifications and skills obtained; - Improved equality in the creation and growth of enterprises; - Improved reconciliation of family and working life. This assessment requires the elaboration of quantified equal opportunities objectives, wherever relevant and feasible. • An assessment of : <ul style="list-style-type: none"> - the adequacy of the means to be allocated to improve equality between women and men; - the extent to which the constraints to equality are to be addressed in the strategy and assistance; - the adequacy of the planned arrangements for ensuring representation of equal opportunities in the management and monitoring of assistance. • Identification of any weaknesses in the proposed strategy and assistance concerning equal opportunities for women and men.
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4.3 Information on equal opportunities to be contained in a Programming Document

The Operational Programme documents that supplement each Community Support Framework should also contain some key information on equal opportunities. This information will serve to inform the Commission more precisely on how it is intended to address equal opportunities within the Community Support Framework. It will also help to ensure coherency between the objectives and strategy concerning equal opportunities at the level of the CSF and those for certain OPs.

The following checklist summarises the information on equal opportunities that will be useful to include in an Operational Programme document. The indications concerning the general information required are based on the recommendations made in the Vademecum, Chapter 1, section II.

Table 6: Information to be included in an Operational Programme

GENERAL INFORMATION REQUIRED	SUGGESTED INFORMATION ON EQUAL OPPORTUNITIES
Introduction	<ul style="list-style-type: none"> • Introduction to the principle issues concerning equal opportunities in the region/s or theme/s covered by the OP
1. Specification of the Priorities and their consistency with CSF priorities and with the national human resources strategy of the Objective3 Plan.	<ul style="list-style-type: none"> • Specification of the consistency of the Priorities with the equality objectives of the CSF and of the national human resources strategy.

General information, cont.	Suggested information on equal opportunities
2. Outline of the measures: title, description, overall aims and objectives, intended beneficiaries, the financial weighting given to each measure and the implementing body for each measure.	<ul style="list-style-type: none"> • An indication of which measures are intended to contribute to the equality objectives (both equality positive and equality-oriented measures). • An indication, as relevant, of the gender breakdown of the intended beneficiaries and of the specific objectives concerning equal opportunities of the equality positive and equality-oriented measures.
3. The financial plan.	<ul style="list-style-type: none"> • Indication of the financial allocations for the different measures and operations aimed at improving gender equality.
4. Implementing Provisions.	<ul style="list-style-type: none"> • The arrangements for monitoring and evaluating equal opportunities and for ensuring attention to equal opportunities in the Monitoring Committee.

4.4 Information on equal opportunities to be contained in a Programme Complement

The Programme Complement presents the programme strategy and priorities and contains detailed information on the programme at measure level. It is therefore an important document for explaining how the objectives and strategy concerning equal opportunities will be translated into practice through the implementation of the priorities. Information on which measures are intended to make a significant contribution to improved equality between women and men (see section 5.2) and on the principal monitoring indicators for equal opportunities (see section 5.3) can be contained in the Programme Complement.

The following checklist summarises the information on equal opportunities that will be useful to include in a Programme Complement. The indications concerning the general information required are based on the recommendations made in the Vademecum, Chapter 3.

Table 7: Information to be included in an Programme Complement

GENERAL INFORMATION REQUIRED	SUGGESTED INFORMATION ON EQUAL OPPORTUNITIES
1. Measures: detailed information on the content of the measures	<ul style="list-style-type: none"> • Identification of those measures intended to contribute positively to improved gender equality. • Relevant indicators for monitoring equal opportunities. • Quantified targets for improved gender equality.
2. Final beneficiaries: definition of type of final beneficiary of the measure	<ul style="list-style-type: none"> • Identification, if relevant, of the involvement of equality bodies.
3. Financial plan	<ul style="list-style-type: none"> • Indication, if relevant, of financial allocations for addressing equal opportunities.
4. Publicity measures	<ul style="list-style-type: none"> • Indication of the measures to be taken to publicise the Programme (see section 5.4).
5. Exchange of data	<ul style="list-style-type: none"> • Non available/available

4.5 Assessing the expected impact of a Plan or Programme

Once it has been verified that the Plan or Programme contains the appropriate information, an assessment can then be made of its expected impact on equal opportunities. Three key aspects should be assessed to ensure that the equal opportunities aspects of the Plan or Programme are relevant, adequate and feasible.

1. Are the objectives concerning equal opportunities relevant ?

- Is there evidence that they reflect the needs and interests of women and men in the target populations or regions, e.g. through consultations with groups and networks ?
- Is there evidence that they are consistent with the policies and priorities of the appropriate national or regional organisations concerned with equality issues, and that these bodies support the objectives ?

2. Is the strategy for addressing equal opportunities adequate ?

- Are all the barriers to equality addressed sufficiently in the priorities and measures ?
- Are the means to be allocated to equal opportunities adequate given the scale of the problems to be addressed ?
- Will there be sufficient expertise in equality issues in the committees and structures for managing the assistance ?
- Do the procedures for selecting projects and for managing and monitoring the assistance include attention to equal opportunities ?

3. Are the objectives and targets concerning equal opportunities feasible ?

- Taking into account the adequacy of the proposed strategy for addressing equal opportunities (as assessed in point 2.), is it likely that the global objectives and specific targets for improved equality between women and men will be achieved ?
- Are the scale and the scope of the efforts on equal opportunities sufficient to achieve sustained reductions in the disparities between women and men, in the labour market, education and training, enterprise, and reconciliation of professional and family life ?

5. MANAGING THE PROGRAMMES TO ENSURE EQUAL OPPORTUNITIES FOR WOMEN AND MEN

5.1 Building balanced partnerships with the right expertise

Ensuring appropriate knowledge and skills in equal opportunities issues, at the right phases and right levels, is critical to the success of the plan or programme. The minimum requirement is: the involvement of organisations representing equal opportunities issues in the Monitoring Committees and in the partnerships managing the assistance; and balanced participation of women and men within the Monitoring Committees.

Wide and regular consultation with representative organisations will also be valuable, to obtain feedback on the relevance and effectiveness of the assistance and to enable improvements to be made to the strategy concerning equal opportunities. This consultation might be formalised as an equal opportunities working group or committee, at the level of the CSF, SPD or OP, to advise and guide the managing authority and Monitoring Committee in their work. Technical assistance, in the form of an equality expert or unit, might also be useful, to provide on-going advice and support to the managing authority and committees.

Relevant bodies and individuals to involve may be:

- Government equality organisations at national or regional levels;
- Civil society women's organisations at national or regional levels;
- Women's or equality committees in relevant social partner organisations (trade unions, business and professional associations);
- Networks or associations of women representing special interests (for example, rural women or migrant and ethnic minority women);
- Research institutes and universities specialising in gender issues;
- Experts in equality statistics.

Ensuring the balanced participation of women and men within monitoring committees is also important. This may be achieved in various ways, for example using quotas (e.g. minimum 40% and maximum 60% of any sex) or a system whereby each partner nominates two members, one of each sex.

Another way of strengthening the promotion of equal opportunities between women and men is to provide training to members of partnerships and committees and to management staff in equal opportunities issues. This training might concern general awareness of equality issues, as well as more technical aspects such as the collection and analysis of appropriate data or the elaboration and monitoring of equality indicators.

5.2 Classifying and selecting projects to ensure equality

It will be important to include, in the management and control arrangements for the implementation of Structural Fund programmes, procedures for ensuring that the projects contribute to the objectives concerning equal opportunities. This will require the elaboration of appropriate selection criteria and procedures for projects and actions.

The selection criteria and procedures will not be the same for all types of projects. Equal opportunities may be given more importance as a criteria for selection within priorities which

aim to make a major contribution to achieving the equality objectives, and a lesser weight within other priorities.

It is useful to start the selection process for projects with an assessment of the potential contribution of the project to the equality objectives. A simple three-fold classification may be used, which enables a priority to be given to the proposed operation on the basis of its intended contribution to the equality objectives.

Classification of operations according to their contribution to equality objectives

- 1. Equality positive.** The operation aims specifically to improve equal opportunities between women and men.
- 2. Equality-oriented.** General operations which will clearly contribute to the gender equality objectives.
- 3. Equality neutral.** General operations which will not contribute to any of the equality objectives.

See Table 8 for more information.

This classification may also be useful in determining the type of equality appraisal to be made of the proposed operation, as well as the identification of any follow-up action to improve the operation's effect on equal opportunities. The classification might be used also as a simple indicator for monitoring the mainstreaming of equal opportunities in programme priorities and measures, and may in addition be useful for guiding the elaboration of appropriate indicators (see section 5.3 below).

The initial classification can be made by the promoter of the project or action, or by the programme management on receiving the application. In the case of classification by the promoter, the application form should request an indication and justification of the classification chosen. In both cases it will be necessary to ensure that promoters provide the information required to appraise the proposed operation and to classify it according to its contribution to the equality objectives.

It will be important to give guidance to project promoters on how to take equal opportunities into account in the planning of the project, and on how to elaborate appropriate targets and indicators on equal opportunities.

Table 8: Classifying operations for their contribution to Gender Equality

Equality Positive Operations

Equality positive operations have as their principal objective the promotion of equal opportunities between women and men. They are specific actions, aimed directly at overcoming key obstacles to the full participation of women and men in the labour market and in social and economic life.

Some examples are:

- Education, training and labour market measures for women returners or single mothers, who require specially-targeted support to help them obtain and retain employment;
- Financial and technical support to women starting up and developing SMEs or social economy initiatives;
- Measures to adapt structures and systems (e.g. for the delivery of education, training, employment and enterprise support) to better meet the needs of women;
- Measures to promote women into technical and management professions;
- Measures to improve the social infrastructure (e.g. health centres, care services for children and the elderly).

Equality positive operations can be identified because :

- Their principal objective is equal opportunities;
- They target disadvantaged groups of women and/or key actors able to influence equal access and participation of women and men in the labour market;
- They comprehensively address the main obstacles to equal access and participation of women and men in the area or sector concerned.

Equality-Oriented Operations

Equality-oriented operations are mainstream operations that take into account the different needs and interests of women and men. Their primary objective is not equal opportunities, but they will nonetheless make a positive contribution to reduced inequalities and improved equality between women and men. Examples might be:

- Support for the development of enterprises in the caring services, which will raise qualifications and offer employment opportunities particularly to women, as well as contribute to reconciliation of work and family life;
- Operations which support the creation, adaptation and growth of enterprises, and which include special financial or other incentives to promote equal opportunities.
- Tourism development, where special efforts are made to improve equality between women and men in business ownership, employment and qualifications in the industry;
- Operations to improve public transport connections between peripheral estates or remote rural areas and employment opportunities and services, which will particularly help women without access to private transport;
- Support for research, technological development and innovation, incorporating efforts to improve the participation of women in technical and managerial positions;
- Telecommunications and information society measures, incorporating efforts to reduce inequalities between women and men in IT qualifications and employment.

Equality-oriented operations can be identified because:

- They take into account, in their design and implementation, the different needs of women and men;
- They include special measures or incentives for the promotion of equal opportunities;
- They contribute to reduced inequalities and improved equality between women and men in the area/s they influence (e.g. labour market, enterprise, education and training, services and infrastructures of working and family life).

Equality Neutral Operations

Equality neutral operations are mainstream operations that will not contribute to reduced disparities or improved equality between women and men. These will be operations that have no direct or indirect impact on labour market and enterprise opportunities of women and men or on the services and infrastructures of working and family life. They may be operations in the fields of energy or certain types of physical infrastructure.

Attention ! Some apparently "neutral" operations may, in fact, make a negative impact on equal opportunities, because they favour employment or enterprise opportunities among groups who are relatively privileged (e.g. men in technical and managerial fields). Particular attention should be paid to such operations, ensuring that the potential biases are counteracted by support for operations that favour more disadvantaged groups.

Equality neutral operations may be identified because:

- They have no direct or indirect impact on the opportunities of women and men to participate in the labour market or in enterprise creation and growth;
- They do not improve the services or infrastructures of working and family life.

This three-fold classification allows a priority to be given to the proposed operation concerning its contribution to the equality objectives. For example:

- **Equality positive:** a **high** priority on equality will be given.
- **Equality-oriented:** a **medium** priority on equality will be given.
- **Equality neutral:** a **low or no** priority on equality will be given. A potentially equality-negative operation might be marked for rejection or redesign.

The prioritisation should be included in the overall scoring of proposed operations, leading to the selection of operations to be financed.

It is recommended to undertake an independent equality appraisal of the selected operations, in order to ensure that the operations are as effective as possible in reducing inequalities and promoting equality. The aims of an equality appraisal are: to verify the likely contribution of the proposed operation to the equality objectives; identify any potential weaknesses in the operation's design; and advise about possible revisions to the proposed operation, or about complementary actions which could be taken, to strengthen the operation's impact on equal opportunities. There is no standard method for appraising the equal opportunities dimensions of operations. Much depends on the type of priority or measure, and the character of the equality objectives, concerned.

The schema presented in Table 9 summarises the overall process recommended above for appraising and selecting operations.

Table 9: Process for appraising and selecting projects

<p>Step 1 <i>Classify the proposed project:</i></p>	<p>Step 2 <i>Prioritise the proposed project (score can be given)</i></p>	<p>Step 3 <i>If the project is selected for financing, undertake an equality appraisal to assess:</i></p>	<p>Step 4 <i>If required, implement follow-up actions:</i></p>	<p>Step 5 <i>Elaborate monitoring indicators:</i></p>
<p>EQUALITY NEUTRAL</p> <p>The project will not contribute to any of the equality objectives.</p>	<p>→ No equality priority</p>	<p>→ - Any potential direct or indirect discrimination, or possible negative effects on equality between women and men, that implementation of the project may create.</p>	<p>→ - Make improvements to the design of the project or propose complementary actions to remedy any likely discriminatory or negative effects.</p>	<p>→ - No equality monitoring indicators are required.</p> <p>- Mid-term or final evaluations should check if the project has had an effect (negative, neutral or positive) on equal opportunities.</p>
<p>EQUALITY ORIENTED</p> <p>The project will contribute to the equality objectives</p>	<p>→ Medium equality priority</p>	<p>→ - Its likely contribution to the equality objectives (employment, education and training, enterprise, reconciliation of professional and family life).</p> <p>- Any weaknesses or gaps in the design of the project relating to equal opportunities issues.</p>	<p>→ - Make improvements to the design of the project to further strengthen the impact of the project on equality.</p>	<p>→ - Elaborate equality monitoring indicators, at the levels of outputs and results, appropriate to the type of project and to its intended contribution to the equality objectives.</p> <p>- Elaborate indicators for evaluating the project's impact on reduced inequalities and improved equality for women and men.</p>
<p>EQUALITY POSITIVE</p> <p>The project will make a substantial contribution to the equality objectives.</p>	<p>→ High equality priority</p>	<p>→ - Its likely contribution to the equality objectives (employment, education and training, enterprise, reconciliation of professional and family life).</p>	<p>→</p>	<p>→ - Elaborate equality monitoring indicators, at the levels of outputs and results, appropriate to the type of project and to its intended contribution to the equality objectives.</p> <p>- Elaborate indicators for evaluating the project's impact on reduced inequalities and improved equality for women and men.</p>

5.3 Monitoring and evaluation

The importance of good base-line data and quantified indicators concerning equality between women and men cannot be understated. Equality indicators have strategic importance since they concern a specific priority area of Community-wide interest. They also have operational importance, since the monitoring of progress against equal opportunities targets is a requirement of the Structural Fund Regulations and may be one of the elements to be taken into account in allocating the performance reserve.

5.3.1 Collecting data and information on equal opportunities

Good base-line data and systematic disaggregation of data by sex will be required for the elaboration of equality indicators. Some data will be easily available, such as sex-disaggregated statistics for labour force activity at national level, or on qualifications and skills. Important sources of sex-disaggregated data and information on equal opportunities are likely to be:

- national and regional statistical offices;
- departments dealing with employment, education, training and social services;
- equality organisations and women's networks and resource centres;
- regional and economic development organisations,
- chambers of commerce and industry;
- research institutes.

Some data necessary for monitoring equal opportunities may be lacking, for example concerning trends in employment and qualifications in specific productive sectors or for the geographical area concerned, or on the reconciliation of professional and family life (on the use of time by women and men, on access to services and on needs and aspirations). In such cases, it will be important to undertake specific studies or surveys, and to encourage and support national or regional bodies to collect and provide relevant data and information.

Data and information will be required not only by programme managers and Monitoring Committees, but also by managers of measures and operations. Dissemination of relevant data to potential promoters of projects and actions should therefore be part of the information activities of Structural Fund programmes.

5.3.2 Equality indicators

The elaboration of equality indicators at all levels of Structural Fund plans or programmes (CSF, SPD, Priority, OP) will be important, for monitoring and evaluating outputs, results and impacts. Details of the equality indicators to be used can be included in the Programme Complement (see section 4.4). During programme implementation, the Annual Monitoring Reports will present the progress achieved against these indicators.

The indicators should measure :

- *the extent to which the disparities between women and men (in the labour market, in education and training and qualifications and skills, and in enterprise creation and management) are reduced during the period in question, and*
- *the extent to which equality for women and men in social and economic life is improved, for instance concerning desegregation in the labour market and participation in decision-making.*

Elaborating appropriate equality indicators thus requires much more than the simple numerical count of the participation of women and men in project activities. Such indicators will be relevant at the level of outputs of measures or operations, but will not be sufficient to measure reduced disparities or improved equality between women and men, at results or impacts levels. For example, there may be higher levels of participation of women than men in certain training and employment measures, but if the women take shorter courses and gain lower qualifications, the operations may not contribute to improved equality between men and women at the levels of results and impact.

Similarly, improved rates of participation of female-owned businesses in SME support schemes (output), or improved rates of female business start-ups (result), may not be sufficient to reduce the disparities between women and men in terms of business ownership nor to improve the survival rates and turnover of female-owned businesses compared to male-owned businesses (impacts). An extra effort will be required, both to improve rates of business creation and growth overall, and also to ensure that women play a relatively greater role.

Some examples of indicators for key equality objectives at the three levels of output, result and impact are given below. These are indicative only, to illustrate the types of indicators that may be relevant at the different levels of the Plan or Programme. Reference should also be made to the Commission's Methodological Working Paper 3 for the new programming period 2000-2006 "Indicators for Monitoring and Evaluation: An indicative methodology".

Equality objective:	Improved equality of participation of women and men in the labour market
Output indicators	Reduced disparities in participation of women and men in labour market assistance schemes by occupational status, sector and occupation.
	Increased proportion of firms or institutions supported who implement equal opportunities strategies.
Results indicators	Reduced disparities between female and male beneficiaries of schemes in relation to placement rates into employment.
	Improved labour market status of women relative to men after participation in employment aid schemes.
	Reduced segregation of female and male employees by occupation in firms or institutions receiving support.
	Improved take-up of professional status by spouses in farm and family businesses.
Impact indicators	Reduced disparities in activity rates of women and men.
	Reduced gaps between women and men in rates of unemployment and long-term unemployment.
	Reduced vertical and horizontal segregation of women and men by economic sector (NACE) and occupation (ISCO).
	Reduced gaps in earnings between women and men.

Equality objective:	Improved equality of women and men in education and training
Output indicators	Reduced disparities between women and men in their relative rates of participation and completion in continuing training, by occupational subject or field of training
	Increase in percentage of firms receiving support which improve the level of qualifications of female employees relative to male employees.
	Improved equality of participation of women and men in certified vocational training courses.
Results indicators	Reduced disparities in vocational qualifications of women and men in the target group/s, by level and occupational subject.
	Improved equality between women and men in qualifications and labour market status after participation in training schemes.
Impact indicators	Reduced disparities in vocational qualifications of women and men in the general active population, by level and field of occupation.
	Reduced vertical and horizontal segregation of women and men in firms or institutions undertaking continuing training initiatives.

Equality objective:	Improved participation of women in enterprise creation and growth
Output indicators	Increased proportion of female-owned businesses supported.
	Increased proportion of women using SME support services (financial, advice, training, incubators).
Results indicators	Increased proportion of women setting up businesses.
	Increased proportion of women setting up businesses in research and technology fields.
Impact indicators	Increased proportion of businesses owned by women.
	Increased proportion of women managing social economy initiatives.
	Improved turnover and profitability of female-owned businesses compared to average turnover and profitability of all businesses.

Equality objective:	Improved reconciliation of work and family life
Output indicators	Numbers of care projects supported.
	% of firms supported that have equal opportunities employment plans.
	% of firms supported that offer social services (crèche, shopping, transport, banking) to their employees.
Results indicators	Net increase in care places available for dependants.
	Net increase in numbers of professional carers.
	Net increase in “neighbourhood services”.
Impact indicators	Increased satisfaction of female and male employees in terms of reconciliation of work and family life.
	Reduction in absenteeism and turnover of staff; increase in productivity.
	Reduction in % of persons unable to work because of lack of childcare services and facilities for the elderly and handicapped.

5.4 Information and publicity

Given the important changes to Structural Fund programming where equal opportunities are concerned, it is particularly important that measures are taken, from the outset and throughout the programming period, to inform potential project promoters of the new regulations and of the new opportunities for supporting equal opportunities initiatives.

Information dissemination activities should be directed at organisations and groups involved in equality issues, to encourage them to put forward project proposals. They should also target “mainstream” organisations and firms, encouraging them to integrate equal opportunities into their projects and actions.

Groups specialising in equality issues might also be encouraged to link up with mainstream organisations, to ensure that any specific projects on equal opportunities are coherent with, and reinforce, mainstream operations. Such link-ups could also assist mainstream operators to adapt their schemes and initiatives to better address the needs and interests of both women and men.

Publicity activities should reach out to both women and men in the target populations. This may mean broadening the appeal of publicity materials, and ensuring that they reach a wider audience. Women’s networks and media could be better used to publicise the opportunities offered by Structural Fund programmes and Community support. Other media could also be considered, such as the Internet, magazines, etc.

The information and publicity activities should ensure that the new approach to equality between women and men is promoted. Stories about “projects for women” could be complemented with images and stories about initiatives that have broken down traditional stereotypes and that have enabled women and men to play more equal roles in social, economic and family life.

Annex 1 : Glossary of terms

Balanced participation of women and men

The sharing of power and decision-making positions between men and women (40% to 60% representation of either sex).

Equal opportunities for women and men

The absence of barriers to economic, political and social participation on the grounds of sex.

Equality between women and men (gender equality)

Women and men are free to develop their personal abilities and choices without the limitations set by strict gender roles and conventions. The different behaviour, aspirations and needs of women and men are considered, valued and favoured equally.

Gender differences

The social and cultural differences between women and men, as well as the different values placed on women's and men's spheres and activities. Gender differences vary from one society or culture to another, and change through time.

Gender inequalities

The inequalities or disparities in any area between women and men in terms of their levels of participation, access to resources, rights, remuneration or benefits.

Indirect discrimination

Policies, procedures or criteria which do not openly discriminate against one or other sex, but which, as a consequence of existing gender inequalities or invisible barriers, have unequal effects on women, or on men.

Invisible barriers

Attitudes and the underlying traditional assumptions, norms and values which prevent the full and free participation of women (or men) in certain areas of social and economic life.

Job segregation

The concentration of women and men in different types and levels of activity and employment, with women being confined to a narrower range of occupations (horizontal segregation) than men, and to the lower grade of work (vertical segregation).

Mainstreaming of gender / integration of equal opportunities

The systematic integration of the respective situations, priorities and needs of women and men in all policies, with a view to promoting equality between women and men. The mobilising of all general policies and measures specifically for the purpose of achieving equality by actively and openly taking into account, at the planning stage, their effects on the respective situations of women and men in implementation, monitoring and evaluation.

Positive action

Measures targeted at a particular group and intended to eliminate and prevent discrimination or to offset disadvantages arising from existing attitudes, behaviour and structures.