

Institutional capacity and effective methods for gender equality

Online discussion report







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Introduction

The Commission has highlighted the need to take gender equality (GE) into account in all its policies (¹) and has committed itself to implementing gender mainstreaming (GM) as an integral part of policymaking, including through impact assessment and evaluation processes. It also expressed the expectation that EIGE will make a significant contribution to the knowledge base on GE. Tracking mainstreaming progress and capacity is fundamental to the work of EIGE, and during 2013 the institute has undertaken some major work in this field.

1. Review of the implementation of the Beijing Platform for Action in the EU Member States: institutional mechanisms for the advancement of gender equality

In 2006, the Finnish Presidency of the Council of the European Union reviewed the institutional mechanisms for GE in the then 25 Member States — the so-called Area H of the Beijing Platform for Action (BPfA) — identifying three indicators, including GM. Building on this work, in 2013 the Lithuanian Presidency chose to review the effectiveness of institutional mechanisms in the EU Member States in order to progress faster towards de facto GE. EIGE researchers reassessed the indicators and gathered new data on national machineries, staff numbers, budgets, etc. As well as reviewing relevant literature at European and national levels, they distributed an online questionnaire to members of the High-Level Group on Gender Mainstreaming — the 'informal group of high-level representatives responsible for GM at national level' in the Member States (²) — and carried out interviews with women's organisations in all 28 Member States.

The report concludes that government commitment, structures and tools remain at very different levels in different Member States. Based on the findings and recommendations in the report, the Lithuanian Presidency undertook to prepare Council conclusions suggesting actions for improving the effectiveness of national institutional mechanisms.

2. Report on institutional capacity for gender mainstreaming in the 28 Member States of the European Union

EIGE also commissioned an in-depth report, mapping out the field of institutional capacity for GM and effective methods for implementation, in particular the effectiveness of a gender impact assessment (GIA) in each of the 28 EU Member States.

The study assesses institutional capacity on the basis of various impact drivers, using several indicators for each one, such as stakeholder involvement; coverage of policy cycle; availability of resources; access to gender expertise; transparency and accountability; structured understanding of gender inequalities; organisational culture; leadership actively committed to GE/GM; and daily routines consider gender.

In addition, the report explores several methods for GM implementation such as gender budgeting, evaluation, GIA, gender analysis, research, indicators and sex-disaggregated data, accountability mechanisms, consultations with stakeholders, training, monitoring and evaluation, gender planning and regulatory activity, awareness raising and, broadly speaking, capacity building.

The study maps out the use of methods in different sectors and the extent to which GE has been mainstreamed in main sectoral overarching strategies, such as those in rural development and research and innovation. In particular, the study focuses on the implementation of one GM method, GIA, in the six countries that best apply it (Denmark, Germany, Spain, Austria, Finland and Sweden), and examines how this is done.

The online discussion disseminated and debated the results of these two studies, and in addition gathered wider data and experience of GM. This report summarises the major points made during the discussion, although it is impossible to reflect all viewpoints. For further details, the discussion transcript can be found in Annex II.

[&]quot;) Strategy for equality between women and men 2010–15, p. 35 (http://ec.europa.eu/justice/gender-equality/index_en.htm).

⁽²⁾ See: http://ec.europa.eu/justice/gender-equality/other-institutions/gender-mainstreaming/index_en.htm.



Organisation

The online discussion formed a bridge between two EIGE activities: an expert meeting on 22 October 2013 to discuss the implementation of GIA and a peer-to-peer exchange seminar on 21 and 22 November 2013 (http://eurogender.eige.europa.eu/events/how-can-we-make-gender-mainstreaming-work). The aim of the discussion was to enable an exchange of information on the current capacities, tools and methods for GM in the 28 Member States and also to increase awareness and to stimulate new initiatives. Through an understanding of the barriers to GM, potential solutions or alternatives, EIGE acts as a support and resource for GM practitioners at all levels.

EIGE invited GE experts and practitioners of GM from the European institutions, Member State ministries and equality bodies, regional authorities, universities, research centres, women's networks, men's networks, equality institutions and EIGE's specialised network: the Gender Mainstreaming Thematic Network.

The online discussion ran for 2 days, on 4 and 5 November 2013, and was divided into four sessions. Participants were invited to comment on several issues related to GM:

- Session 1: Benefits of gender mainstreaming and positive outcomes for gender equality policy and sectoral development:
- Session 2: Use of methods for gender mainstreaming, in particular gender impact assessment, indicators and other tools;
- Session 3: Obstacles to the implementation of gender mainstreaming, the impact of the crisis;
- Session 4: Steps forward: how to reinvigorate the GM agenda drivers for progress.

Participation

Thirty-one people registered in advance for this online event. Twenty people took an active part in the discussion and posted 226 contributions, as well as sharing documents, videos, examples and experiences related to the topics of discussion. Participants came from both older (Belgium, Spain, Italy, the Netherlands and Portugal) and newer Member States (Bulgaria, Croatia, Lithuania, Hungary, Poland and Slovenia), as well as one person acting on behalf of the United Nations Development Programme (UNDP) in Pakistan, and a European Parliament official working on citizens' rights and constitutional affairs, specifically for the Women's Rights and Gender Equality Committee (FEMM). Among the active participants were experts in national institutions, university academics, researchers and consultants, and representatives from NGOs and international organisations (such as the International Labour Organisation (ILO) and the World Peace Foundation).

Additional statistics and information concerning the online discussion can be found in Annex II and Annex III.



Background

In the 1990s, the political strategy for achieving GE underwent a major transformation. Out went women's departments, women's issues and segregated activities. In their places came 'mainstreaming'.

Mainstreaming means integrating gender analysis, women's interests and perspectives and gender-equality goals into all policies and planning procedures, legislation, implementation, monitoring and evaluation, at every level. It set out to be a revolutionary approach that should inject gender awareness into every corner and at every stage of policymaking. It should change the very definition of human development to include GE as an integral part.

Gender mainstreaming has been adopted and promoted by the United Nations, the World Bank, national governments, human rights and GE organisations, and the European Union institutions and Member States. For many supporters of GE, it is regarded as the only strategy that can deliver real equality for women, forcing policymakers to take account of women's interests in 'hard' policy areas such as economic growth, urban development, transport networks, infrastructures, research and technology, where gender impact has traditionally received little attention. But for many others, its adoption has signalled a process of disillusionment. To quote the conclusions of EIGE's report on 'Institutional mechanisms for Gender Equality, Area H of the Beijing Platform for Action':

'The evolution towards diversity mainstreaming, addressing a range of inequality grounds, in policymaking has led to the gender dimension having been diluted and lost focus.

In practice, this has also meant a significant reduction of resources being devoted to the consideration of gender equality in policymaking.'

During the past 10 years, in the EU, Member States and the European Commission have reported slow progress. Lack of institutional capacity or channels of accountability have tended to distort GM into a technique with no transformative power. GM initiatives have been underfunded, under-resourced and even undermined. In short, GE seems to have been mainstreamed into oblivion.

However, there is also evidence that valuable tools have evolved to meet the challenges of implementing and evaluating GM, such as new methods for collecting gender-disaggregated data or gender-responsive budgeting. GM has an undeniable potential to achieve broad results if properly applied.

One of the issues surrounding mainstreaming, for many people, is defining exactly what it is. This has led to some conceptual confusion and held back progress. It has also become clear that the successful implementation of mainstreaming depends to a great extent on the political will and gender awareness of the individuals involved. Without conviction, it can easily degenerate into a 'tick box' exercise.

EIGE's online discussion on institutional capacity and effective methods for GM aimed to cast light on the value of different forms of institutional capacity and methods, and how they are applied in different Member States.

Summary

Session 1: Benefits of gender mainstreaming and positive outcomes for gender equality policy and sectoral development

The principle of GM first gained global recognition in the 1995 Beijing Platform of Action. The EU adopted its own definition in 1996.

GM is 'the integration of the gender perspective into every stage of policy process design, implementation, monitoring and evaluation — and into all policies of the Union, with a view to promoting equality between women and men. It means



assessing how policies impact on the life and position of both women and men and taking responsibility to re-address them if necessary. This is the way to make gender equality a concrete reality in the lives of women and men: creating space for everyone within the organisations as well as in communities — to contribute to the process of articulating a shared vision of sustainable human development and translating it into reality.' Is this an adequate summary?

It was agreed that the debate should be launched on a positive rather than a negative note, and for that reason the first session focused on the benefits of GM.

Guiding questions

- What have been the positive outcomes for GE policy since Beijing?
- How has GM impacted on sectoral development?
- What positive examples of GM can you give?

Main conclusions

Regarding the definition of GM, there was a feeling that the complexity of the concept makes it difficult for people to commit to. The distinction between 'sex' and 'gender' was highlighted, and participants underlined that GM must not be an end in itself but a process leading to GE.

While there were few specific success stories, there were nonetheless some useful practical illustrations of finding solutions in specific sectors and policy areas, especially if planners can be convinced that simple changes can make a difference. Being able to point to some 'wins' makes it easier to persuade and encourage the wider public. However, GM practitioners find it difficult to guide and monitor policymakers in all areas at the same time, especially if they are not an expert in a specific field. Belgium has proposed a 'gender test' to be applied to all new proposals by 2014. Training and awareness raising at all levels were seen as crucial and there was a consensus that the EU could usefully draw up a standard mainstreaming training programme.

Session 2: Use of methods for gender mainstreaming, in particular gender impact assessment, indicators and other tools

The second session aimed to examine in greater depth the various tools and methods associated with GM and the institutional capacities needed to implement them.

At the end of 2012, EIGE commissioned an in-depth report on 'Institutional capacity for gender mainstreaming in the 28 Member States of the EU', which will be available soon. The study set out to gather information and evidence for strengthening the mainstreaming of GE into selected EU polices and subsequent national policies. Its specific objectives were to make information available on institutional mechanisms for mainstreaming GE in the European Commission and the EU Member States and to increase knowledge on the methods for GM, specifically GIA.

Throughout the 2 days, Priya Alvarez, a project manager from EIGE's gender mainstreaming team, outlined some of the findings from the two research projects carried out in 2013 in the context of the Lithuanian Presidency of the Council of the EU: the official Presidency report on Area H (institutional mechanisms) of the Beijing Platform for Action and a qualitative research on institutional capacity and methods for GM.

The location of the GE machineries is addressed in the Lithuanian Presidency report. When examining at what level of government the responsibility for GE lies, two thirds of the 28 EU Member States reported that in 2012 GE was promoted through a cabinet minister responsible for that portfolio. In five Member States the highest responsibility in the government for the promotion of GE was vested with an assistant minister, deputy minister or vice-minister.

There are many GE central structures in charge of implementing GM in most EU Member States. A few countries (six) have created specific structures for promoting GM. Others assigned this task to staff members attached to the central structure (Estonia and France). In general, gender focal points or inter-ministerial groups have also been tasked with this responsibility.

EIGE's research on GM analysed several parameters to assess institutional capacity. Resources and stakeholder involvement were two of those parameters that were reliable in at least 10 EU Member States. Structured understanding of gender inequalities and coverage of policy cycle remained weak parameters in at least nine EU Member States. The weakest parameters overall were found to be organisational culture, access to gender expertise, daily routines, leadership, transparency and accountability. Daily routines, as an impact driver for GM, was one of the weakest parameters for 19 Member States.



Gender budgeting (GB), evaluation and GIA are considered the main methods for GM. Other methods were explored in EIGE's research on institutional capacity and effectiveness of GM in the EU, as follows: gender analysis, research, indicators and sex-disaggregated data, accountability mechanisms (reporting, informing the parliament), consultations with stakeholders, monitoring and evaluation, gender planning and regulatory activity, awareness raising and, broadly speaking, capacity building.

As of 2013, 27 Member States have adopted an action plan or other form of regulation for GM. In 2005, only 15 Member States had national action plans for GE. Together with sex-disaggregated statistics, gender planning and regulatory activity, it is one of the most broadly implemented methods for GM across the EU. Capacity building, research and consultations with stakeholders are also quite common as methodologies or ways to operate to mainstream GE.

Generally speaking, EU Member States report that they trust training as a means to create a working culture for GM but it seems not to be enough. Twenty-one countries were identified where capacity-building initiatives targeting public sector officials took the form of training courses. Generic GE training courses seem to be organised more frequently than specific training courses on GM. Sixteen countries reported organising GM training, but only some of them reported conducting training systematically. GE training only happens in six Member States (Spain, Croatia, Luxembourg, Malta, Austria and Finland) where their governmental employees are trained on a regular basis. Employees at the highest political level were trained regularly in Belgium, France and Finland. Gender training on an ad hoc basis was obviously more prevalent, particularly for employees of other ministries/departments.

Despite the fact that a number of Member States have created provisions in policy and legal documents for the deployment of GB (Belgium, Denmark, France, Portugal and Finland), only Spain, Austria and Sweden actually apply a gender perspective to their budgets. Five Member States (Belgium, Czech Republic, Finland, Sweden and the United Kingdom) reported to use GB in some ministries. In the majority of cases (in 20 Member States), it was still at the initial stage or practically an unknown concept in public administration.

Results on GB implementation are quite limited but promising if compared with the situation a few years back. There have been many more local/regional budgeting initiatives than national. At national level, GB evolved from practically an unknown concept in Estonia, Hungary and Malta in 2005 to being in its initial stage in 2012. It also went from an initial stage in 2005 to being used by some ministries (Belgium, Finland and the United Kingdom) or nearly all ministries (France and Austria) in 2012.

The majority of EU Member States have developed legal or policy provisions for the implementation of GIA, along with guidelines and other support materials (e.g. checklists) to assist with putting this method into practice.

Generally, the practice of GIAs seems to be used in relation to the preparation of legislation. In a few countries, GIA appears rather formalistic, and resembles a 'tick-the-box' exercise that does not entail real analysis. Only four Member States (Spain, France, Poland and Sweden) reported that the application of GIA in drafting laws brought an adjustment in the majority of cases to make the final outcomes more gender equal. Comparing the situation in 2005 to 2012, the use of GIA in law drafting declined in 10 Member States. Similarly, in 2012, in five Member States, the GIA of policy programmes, action plans and projects was used less often.

In 2012, 13 Member States had a legal obligation to apply GIA, with only two of them (Spain and Sweden) reporting that they used it widely for drafting laws and also for policy programmes, action plans and projects, and another five (Czech Republic, Denmark, Germany, France and Finland) using it sometimes. The remaining six Member States reported that GIA for drafting laws as well as for policy programmes, action plans and projects was still at its initial stage or practically an unknown concept.

In EIGE's research in 2013, 14 Member States reported that they evaluate gender policies or programmes at the end of their implementation cycle. The gender policies most commonly evaluated are national action plans and policy-specific strategies or programmes. Gender ex post evaluation was carried out in 2012 in 15 Member States covering various policy domains such as employment, health, agriculture, family policy, women victims of violence, education, protection of minority rights or integration of migrant women.

Guiding questions

The debate focused on supply-side barriers and on actions to address these. The key guiding questions were:

- What tools and methods are used in your country for mainstreaming? Are they effective?
- What is the institutional framework for GM? Is it adequate? What more is needed?



- Can you give examples of using specific tools, such as GB or GIA?
- Are you involved in networking or exchange of good practice?

Main conclusions

The discussion looked in detail at a number of tools for GM, with special interest in gender sensitive budgeting and GIA. Participants emphasised the importance of accountability — for instance, through reporting back to senior decision-makers, as happens in Belgium — and the need for political commitment at all levels. It was agreed that some awareness of GE is necessary for the successful implementation of mainstreaming methods and tools.

Some participants also argued that GM may be easier to implement effectively at regional or local rather than national level.

Session 3: Obstacles to the implementation of gender mainstreaming, the impact of the crisis

Many participants were clearly disappointed by the way GM has been implemented so far. So the third session set out to examine the problems and identify solutions.

The economic crisis is affecting policy implementation across Europe. The Lithuanian Presidency report on institutional mechanisms, which formed the basis for Council conclusions at the end of 2013, refers to the impact of the crisis as 'a widespread concern'. In the field of GM, the negative impacts already identified — undermining both GM policies and institutional capacity building — include cuts in budgets and staff, merging of departments or policy areas, rationalisation and demands for the same or more tasks to be carried out with fewer resources.

Guiding guestions

- Has the economic crisis had a negative effect on mainstreaming? If so, in what way?
- What obstacles have you encountered?
- Have you identified ways to overcome obstacles?
- Have you found that men are ready to apply mainstreaming, or does gender remain a 'women's issue'?

Main conclusions

While participants confirmed that the crisis has had some negative impact on mainstreaming progress, it was pointed out that GE policies can also offer solutions.

A number of elements need to be combined to enable GM to fulfil its potential. The list includes:

- political commitment;
- monitoring and evaluation;
- accountability and incentives;
- financial and human resources;
- sustainability;
- binding legislation, with rules and penalties.

Participants drew attention to many obstacles that they have encountered in implementing mainstreaming. These include inconsistent support from governments; lack of accountability and incentive structures; insufficient financial and human resources; and poor sustainability approaches. Many GM procedures and practices have been introduced and actively pursued for a short period, before gradually declining in use. Results reporting and learning have been seriously constrained by inconsistent approaches to monitoring and evaluation. Changes in government often interrupt the implementation of programmes which need time to take effect. It is also possible that politicians will take a short-term approach to policy in order to gain popularity and votes. In addition, they tend to perceive women as the only beneficiaries, and that is why it is so important to involve men in decision-making posts in GE and provide general training on the benefits of GE.

Without political commitment, particularly from the top levels of government, mainstreaming can degenerate into a cosmetic exercise making little progress. Everyone welcomed EIGE's role as facilitator and resource provider. But while it is vi-



tally important to carry out pioneering research, there also seems to be a demand for more easily accessible materials such as 'success stories'. The discussion also touched on the need to work with civil society, plus the importance of encouraging innovation as a means to win hearts and minds, like working with 'champions'.

Finally, there was some suggestion that in the future there is scope for rethinking the approach.

Session 4: Steps forward: how to reinvigorate the GM agenda — drivers for progress

The online discussion formed just one part of EIGE's programme of activities and events focusing on GM, designed to help the institute to establish its agenda for future action in this field. Participants were alerted to the peer-to-peer exchange seminar scheduled for 21 and 22 November 2013.

The last session called for some 'blue sky thinking': some new 'metrics and metaphors' (3) perhaps, a fresh narrative and some new inspiration. GM: does it need, tweaking, strengthening or revolutionising?

The goals underlying GM and GE actions in Member States reveal different types of values. Values which in some countries are regarded as GE policy objectives might be contested elsewhere.

There seems to be a lack of clarity on whether GM is meant to avoid unequal impacts of policies on women and men, to ensure gender neutral policies, or rather to redress existing inequalities through policies wherever possible.

The assessment of the breadth of GM in countries can be done, but assessing the depth is a challenge due to the absence of clear objectives and due to inadequate monitoring and evaluation practices.

Guiding questions

- Is GM bringing positive change?
- Do better, alternative strategies exist?
- How can institutional capacity be improved?
- How can the GM agenda be revitalised? What are the drivers for progress?

Main conclusions

The session identified transformation as both the starting point and the result of GM. But participants drew attention to the major differences between attitudes and capacities in different Member States. One participant suggested the EU should introduce a compulsory reporting procedure — similar to existing systems to measure growth and employment, for example — with each country having its own baseline and targets set and monitored annually by the European Commission, with recommendations for progress. EIGE would provide support in developing policy and meeting goals.

Despite a tough analysis of the impact (or lack of it) of GM on day-to-day policymaking in the EU, the consensus was that we should be ambitious: targeting the macroeconomic agenda, formulating new directives and urging governments to take responsibility for GE policies at the highest level.



Experts' contributions and key issues

Defining gender mainstreaming and assessing its impact

This first session started with general agreement on the definition of GM (see above), but concern that it remains a complex and often misunderstood concept, and that this in turn discourages people and acts as a barrier to take-up and implementation. It is also important to recognise the difference between 'sex' and 'gender' in the use of terminology.



'For people who are not gender experts (i.e. the people who have to integrate the gender perspective in their own work), this [definition] seems to be too complicated.' Jeroen Decuyper



'I am afraid that recently we tend to forget that GM is not an objective or an end in itself. It is a means to achieve gender equality . . . The GM project is a beautiful concept, but the execution is so difficult exactly because of the fact that the term is so cryptic and obscure.' Barbara



'I agree that we cannot have very easy for understanding definition — we'll be explaining and explaining. But this is a process and until we reach a critical mass of people who know what this is about and support the process — GM will be not applied properly!' Stanimira Hadjimitova



'It needs to be "demystified" and "translated" in more practical and concrete terms, so that people in institutions really understand it is not feminist jargon but really change in every day practices and procedures.' Benedetta Magri



We are getting truly cryptic with all the gender jargon, alienating many people along the way. Priya Alvarez



'People first have to understand that sex is not the problem, but the social construction around sex (gender). When preparing a policy, people have to realise they often get influenced by their views on gender: e.g. when preparing a policy on employment, they will far too often have a male, full-time employee in mind.' Maria José Carrilho

One participant highlighted a potential conflict of interest for those responsible for implementing GM:



'I am pretty convinced that nobody really wanted to specify that the very people/institutions/organisations responsible for introducing gender mainstreaming were pretty much the same that the gender mainstreaming transformation was imposed on. So it was quite understandable, and quite obvious, really, that they resisted, preferring to reproduce "as is".' Agata Czarnacka

Can mainstreaming achieve fundamental change?

The word 'mainstreaming' suggests merging with an existing culture and continuing in the same direction. What does this say about its transformative potential? We were reminded that the ultimate objective is equality, human rights and justice, as well as fundamental change in power relations between women and men. GM needs to be redefined in a perspective that not only focuses on needs but also on empowerment and human rights. One reason for its supposed 'failure' is having missed the critical link with rights enforcement and non-discrimination.



'Gender mainstreaming should be this transforming strategy and should be planned and implemented to become the long agenda. If this happens, gender mainstreaming will breach the genderedness of organisations.' Barbara



The most positive aspect of BPfA's idea to mainstream gender is its potential for becoming a long-term agenda, a truly transformative one. It is a great contribution as opposed to the earlier short-term agenda dealing with promotion of women's rights.' Sandor Kaszas



We promote the idea that women are equal to men, and by using the very term "gender" we indicate that the difference is purely social/cultural. And yet we expect some essential transformations to come out of the process. I think we need to dismantle this aporia if we are ever to succeed in GM.' Agata Czarnacka



The importance of gender equality is highlighted by its inclusion as one of the eight millennium development goals (goal three) and by its intricate relationship with the other seven millennium development goals. It is very important to reflect today on where we stand as regards the gender mainstreaming implementation. With current debates on Sustainable Development Goals (SDG), it is very crucial to stress the importance of gender equality for post-2015 agenda. 'Sandor Kaszas





The arguments which are currently used against GM are similar to the arguments which were used to maintain slavery in the 18th and 19th century. We should be clear and firm: there is no economic argument to violate human rights or to apply gender injustice. 'Thera van Osch

There were warnings against allowing mainstreaming to degenerate into technical or administrative routines, although even these could help to raise awareness among the individuals involved.



'Mieke Verloo coined the term "toolkit approach" and warned that it might involve a "deradicalisation" in terms of losing the power dimension of the gender struggle and leave the prevailing unequal gender relations untouched. The increasing reliance from the European Commission on technical solutions to the problem of gender inequality does not address the problem of power structures and existing hierarchies.' Sandor Kaszas

Implementation of gender mainstreaming in Member States

The location of the GE machineries was addressed in the Lithuanian Presidency report this year. Two thirds of the 28 EU Member States (Belgium, Bulgaria, Czech Republic, Denmark, Germany, Estonia, Spain, France, Italy, Cyprus, Latvia, Lithuania, Luxembourg, Hungary, Malta, the Netherlands, Austria, Slovenia, Finland, Sweden and the United Kingdom) had a cabinet minister responsible for promoting GE in 2012. In five Member States (Ireland, Greece, Portugal, Romania and Slovakia) the highest responsibility in the government for the promotion of GE was vested with an assistant minister, deputy minister or vice-minister.

One problem has been confusion with specific equality policies. There needs to be a very clear distinction between the integration of a gender perspective in the policy of the ministries and cabinets, on the one hand (GM), and specific GE policies (positive actions, like quotas and sensitisation actions) in the human resources policy of organisations on the other hand. These two strands are often referred to as the 'dual agenda'.



'Gender mainstreaming and specific gender equality policies have to be executed one next to the other . . . I hope that the combination of both will lead to more equality.' Jeroen Decuyper



'I would share the Portuguese experience of developing a gender action plan. The fourth national plan for equality — citizenship, gender and non-discrimination (2011–13) is an instrument of public politics to promote gender equality. All sectors of public administration (central, regional and local) are responsible for its implementation.' Maria José Carrilho



'CIG, the Portuguese institutional mechanism for gender equality, coordinates all the plans ... The plans are the instruments of public policies and therefore the coordination should remain at that level.' Fatima Duarte



'In Bulgaria, the Ministry of Labour and Social Policy (MLSP) has formed a working group to draw up legislation on gender equality. One positive example of mainstreaming has been the introduction of parental leave.' Stanimira Hadjimitova



'In Poland, gender mainstreaming is not only neglected but also ridiculed, and "gender" as a political term is currently becoming a hate-object in Polish discourse.' Agata Czarnacka



'In our study, daily routines were one of the impact drivers for gender mainstreaming as part of a model for institutional capacity. But it was one of the weakest parameters for 19 out of 28 Member States.' Priya Alvarez

Importance of coordinated action at supranational level

Accountability is seen as a key element to ensure compliance with international obligations and to further the implementation of the GM agenda.



We need to create accountability mechanisms and incentive systems, to ensure that gender mainstreaming is structurally anchored throughout the policy cycle and in the budgetary process. In the EU, we see that progress is made since we have the gender action plan on mainstreaming gender equality and women's empowerment in development (2010–15) ... The problems of lack of capacity and lack of will and motivation for gender mainstreaming are mostly at the level of middle management. However, as soon as their careers depend on their gender performance, they will be looking for capacity building to increase their effectiveness. Thera van Osch



'I work with cultural exchange in Africa and Asia, directly talking to people in the field, to exchange ideas for betterment. This is so important, because here we might find the roots to inequality and together we can develop a better society.' Christina Andersson





'All over the world, operators in the garment sector are predominantly women, but in Pakistan it is the other way round. There are many different factors responsible for this very low participation of females in garment units. UNDP Pakistan launched a project with the focus on employing women in garment units and then imparting training through international consultants thus creating an incentive for factory owners and on the other hand getting employment for women. Thus we were successful in getting more than 12 000 women employed over the last 4 years.' Mehmood ul Hassan

The need for a legal basis

Participants generally agreed that legislation at EU and national level is necessary to reinforce the case for GM. Equality or women's rights departments should be as independent as possible, rather than being subsumed under social affairs policies.



There is a need to have GM regulation on EU and national level. We know from experience with gender equality-related initiatives that it must be at least a directive. Governments do not take European Parliament resolutions seriously at all.' Veronika Bartha Toth

Sectoral policies

EIGE's research looked at the policy areas most and least sensitive to GM. Business and transport were both hard to influence but, oddly perhaps, so were culture and environment. Among the most sensitive were education and social policy. In research and innovation, for example, only two Member States are fully gender sensitive: Spain and France. In rural development, it is just Spain, Croatia, Lithuania and Finland. There was discussion about what can be done to penetrate 'hard' areas like business and the economy.



The ILO's International Training Centre (ITC-ILO) does work a lot in gender mainstreaming of development assistance and the "usual suspects" are social policy, education and health. There is quite a lot done in employment. However, interestingly, gender mainstreaming in transport and infrastructure can become quite "easy", if practical solutions and quick wins are proposed to planners (e.g. increasing safety in roads, improving justice infrastructure).' Benedetta Magri



'One problem for the Belgian Federal Institute is that it is required to support all ministries and cabinets in gender mainstreaming, even in fields where staff have no expertise and where the gender perspective is less evident or less researched, and there are even less concrete examples, such as chemical regulations or fiscal fraud. It would be interesting if at one point in time, EIGE and its resource and documentation centre could focus on collecting studies in those less evident domains.' Jeroen Decuyper



'It is important (and difficult) to find the right balance between the focus on certain projects and including everyone and all domains. It is important to avoid an "overstretch" where you try to integrate the gender perspective in everything, and end up with nothing. We have also learned the importance of good practices. You need a couple of "wins" to convince others to join in and to show those working on gender mainstreaming that it is not all for nothing.' Jeroen Decuyper



We need support for girls in the "hard" subjects in the universities — after they finish the education — to start working in the same spheres, . . . and support for men taking "soft" professions.' Stanimira Hadjimitova



'Gender mainstreaming is not credited for the benefits it brings. Improving lighting in streets and parking areas is good for women but many men report feeling safer as a result, even if they do not know that some gender mainstreaming actor brought it into the policy.' Priya Alvarez

Training, political commitment and awareness raising

Success depends a great deal on the awareness and commitment of the people implementing GM policies. Planning and leadership are important ingredients. The next step should be examining the conditions for change, the potential benefits of mainstreaming gender into the operation and whether the will to do so exists, followed by a planning phase and evaluation. One participant felt that trainers should be male, in order to be heard, although another described this as the 'catch 22' as regards equalising women's voices in public.



'In my opinion, before GM work begins, the entire organisation, from management on down, must be given training on gender equality and gender.' Veronika Bartha Toth



There was support for the idea of a common GM course, designed at EU level and applied nationally as an obligation for decision-makers at all levels (and especially in finance ministries). The checklist for mainstreaming training would include: (1) procedures and practices, including tools, training, and monitoring and evaluation; (2) leadership, with a focus on senior management commitment; (3) human and financial resources; and (4) accountability and incentive mechanisms.



Training must be standardised, comprehensive and sustainable. EIGE should advocate for a directive on mandatory gender training in EU Member States.' Sandor Kaszas



The gender mainstreaming agenda is so broad that I wonder how far we can go with standardising. Perhaps we should extend training to a broader concept. Maybe coaching people, being available when they need to discuss ...' Priya Alvarez



'In terms of successful gender mainstreaming over the last 15 years within the ILO and the UN we have seen that there are a number of key elements of success ... Political commitment at the highest level that is translated into support at the level of senior and middle management ... is critical, and we have seen it work when gender mainstreaming is part of the institutions' accountability mechanisms.' Benedetta Magri



'Organising competitions and rankings and publicising their results can be very useful.' Sandor Kaszas



'One of the latest discussions on gender mainstreaming in the UN was the work with "champions"... normally a woman with a bit of power, or power position or personal charisma, able to pass on the message and get some followers or get something done under her/his leadership.' Priya Alvarez

The impact of the crisis



The situation is being worsened by current economic crises. The offices for gender mainstreaming or dealing with gender issues in different sectors and institutions are being shut down because of lack of money.' Sandor Kaszas



'Mainstreaming is sometimes used as a pretext for saving overall resources: often ministries claim to have applied gender mainstreaming and use this to justify the lack of staff, resources and programme planning allocated to specifically address gender and women's issues ... One more argument for focusing on gender budgeting, especially with the current crisis, is to promote gender equality via taxes and social benefits systems.' Barbara



The World Bank is very aware that gender equality is part of the solution to the crisis (smart economics). The Food and Agriculture Organisation (FAO) shows that gender equality can solve the problem of hunger in the world. The UN Security Council advocates for gender equality in peace and security as a solution to armed conflict.' Thera van Osch

Methods for gender mainstreaming

The main methods for GM are gender budgeting, evaluation, GIA, gender analysis, research, indicators and sex-disaggregated data, accountability mechanisms (reporting, informing parliaments), consultations with stakeholders, training, monitoring and evaluation, gender planning and regulatory activity, awareness raising and, broadly speaking, capacity building.

EIGE's studies showed that in 2012 gender ex post policy evaluation was carried out in 15 Member States, covering various domains, such as employment, health, agriculture, family policy, women victims of violence, education, protection of minority rights or integration of migrant women.

Gender impact assessment is defined as 'ex ante evaluation, analysis or assessment of a law or programme that makes it possible to identify in a preventative way the likelihood of a given decision, law or programme to have negative consequences for the state of equality between women and men'. It is used effectively in Denmark, Spain, France, Austria, Finland and Sweden, but in some countries tends to revert to a 'tick-box' operation.



'GM on the local levels is much easier because gender analysis and GIA is much more "obvious" on the local level where strategies, plans and projects are easier to be monitored due to their strong and visible linkage to the everyday life of the citizens.' Office for Gender Equality, Government of the Republic of Croatia

Belgium has introduced an obligation for ministries to report to Parliament, which has been successful in raising interest. There is an advisory committee on the equality of women and men in the Senate and a commission on social inclusion in the Chamber of Representatives. The federal institute has also produced a manual on gender budgeting.





The Belaian Federal Institute for equality of women and men aims to ensure that people in charge of policy preparation, definition and execution integrate the gender perspective into their own work, so that policies are gender sensitive. But this is complicated by the fact that people do not always understand what is expected.' Jeroen Decuyper



The institute has trained an interdepartmental coordination group. It is now guiding the integration process by limiting the field of action through the federal gender mainstreaming plan. Each minister chooses two policies and commits themselves to integrating the gender perspective in these policy lines. The institute supports them by providing templates to guide the process. As well as action on public procurement, by 2014 there should be a "gender test" for all new proposals.' Jeroen Decuyper



If approved, the gender test will consist of questions to guide the gender mainstreaming process: What is the sex-disaggregated composition of the target audience? Are there differences between women and men in this target audience and can these have a negative impact on their situation — e.g. in the domain of employment, women work far more part-time, which can lead to limitations on revenue, experience, pension rights, etc. Have measures been taken to diminish a possible negative impact? A manual with concrete examples will be provided.' Jeroen Decuyper

Austria is the leading exponent of gender budgeting, which is also applied in Spain and Sweden. The European Commission defines it as 'a gender-based assessment of budgets, incorporating a gender perspective at all levels of the budgetary process and restructuring revenues and expenditures in order to promote gender equality'. Participants took the view that gender budgeting is results-oriented and should prompt action. It requires support from political players, a high level of gender analysis and additional allocation of resources. Budget planners require hands-on training and specific procedures, and need to be capable of identifying indicators and measuring progress. A lack of knowledge of GE is an obstacle in several countries.



Gender budgeting \dots helps to secure efficiency, effectiveness, transparency and accountability of programming. With the support of the European Commission, we [UNDP] organised a gender budgeting competition for municipalities. It was a great chance for municipalities to get acquainted with gender budgeting principles and also improve their skills.' Barbara



'GB can be powerful advocacy tool and can illuminate the relationship between budget allocations and political priorities, and how they impact women and men.' Sandor Kaszas



In a GB initiative in the Basque country, they found that more men than women were benefiting from a social programme targeted to the elderly that provided home assistance for housework chores like cooking and cleaning. The main reason was that the ability to cook was one of the criteria for the selection of beneficiaries.' Priya Alvarez

The role of different actors

The need for involvement of civil society was also emphasised. One example came from Croatia, where in 2008–11, the Ministry of Agriculture, Fisheries and Rural Development launched a questionnaire on the needs and attitudes of rural women, as a basis for a future national strategy.



The lack of political commitment and consistent lobbing from civil society (lack of financial resources) makes advocating for gender equality more difficult nowadays. It seems that push for fighting violence against women is a great example of civil society mobilisation.' Veronika Bartha Toth



The more I work in different institutions and gender-related spaces, [the more] I realise how crucial the pressure from civil society groups is.' Priya Alvarez

The European Parliament can be a key player to prompt action on GM from governments.



We are presently preparing a study on the effectiveness of the Women's Rights and Gender Equality Committee (FEMM) to assist the other committees in gender mainstreaming their work. The work in this field is based on a European Parliament resolution already adopted on 13 March 2002 on "gender mainstreaming in the European Parliament" ... Although the European Parliament is one arm of the Union's budgetary authority, it seems to be hampered by the lack of gender budgeting and gender impact assessments carried out by the Commission.' Erika Schulze

EIGE is called to play a crucial role in monitoring progress, evaluate the state of play and provide technical support to EU institutions and Member States.



I know that EIGE is a research institution but it is necessary to produce data that can be used for political advocacy. With the Beijing and Cairo processes it is our obligation to assess critically what has been done, to address the growing problem of backlash against women's rights and to create a sustainable framework for action on GM.' Barbara





'EIGE is doing a great job working as a competence centre. Also your other initiatives, like this discussion, are very useful to support our work on gender equality.' Sandor Kaszas



'I think that in EIGE we need to refine what we do to be really effective. These discussions open a window to know from people out there what is useful, in which way, how they see change, action, impact.' Priya Alvarez



'EIGE should be the spider in the web between the European Commission, EU Member States and the community of gender trainers and advisors.' Thera van Osch

Obstacles to gender mainstreaming

Some of the main issues identified were shortages and lack of consistent support from governments; of accountability and incentive structures; of sufficient financial and human resources; and of sustainability, as many GM procedures and practices have been introduced and actively pursued for a short period, before gradually declining in use. Reporting results and learning have been seriously constrained by inconsistent approaches to monitoring and evaluation.



The most important thing is political commitment. But the question is how to get it. Normally governments change every 4 years, and every time, gender equality machineries have to convince the new government to implement the strategy. I think that the only solution would be clear rules and penalties set by the EU so that people developing policies would be obliged to learn and use it as their daily task.' Sara Slana



'I think that the very baseline of our work needs to be rethought and reconceptualised.' Barbara

The way forward

The majority of interventions urged a more proactive and ambitious application of GM practices, by targeting top decision-makers and high-profile policies such as macroeconomic planning, introducing new legislation and empowering EIGE to advise EU institutions.

Inspired by a workshop organised by EIGE on GM implementation in October 2013, Thera van Osch formulated a set of practical recommendations for EIGE on the way forward: to focus GM on one strategic sector which is crucial for the future of Europe; to establish a baseline; and to develop a gender action plan with an operational gender performance framework for the sector. The aim would be to hold the EU Member States accountable. For that purpose, the operational framework should be simple and clear with a limited number of specific objectives, actions and targets. It should be the result of participative dialogue among the Member States, facilitated by the EC and endorsed by the EU Council, and include a reporting mechanism. The status of the gender performance framework should be a Council document. Each year, the Member States would have to report to the Council on the advances made on GM in a specific sector. EIGE would provide technical support (4).



'Revolution is needed, or at least revolutionary change in approach to gender equality. We need to re-politicise the agenda in order to secure consistent support and prioritisation of gender mainstreaming in policymaking ... Collecting experiences from one sector and making an impact in one area can later serve as a "success story" and reference for future work.' Sandor Kaszas



We need to convince prime ministers to do gender equality, and they will not do this without a directive ... What if EIGE produces data that could be used by the European Parliament or the European Commission to push for some important legislation (again, a directive rather than a resolution)? With directives we at least have sanctions against those who do not comply ...' Sandor Kaszas



The persistent and growing gap between macroeconomics and gender mainstreaming needs to be addressed.' Barbara



The gender mainstreaming perspective implies that the gender authority should have the capacity of advising about all public policies. However, this is not the case nowadays ... How can the European Commission apply the mainstreaming perspective if its gender think tank [EIGE] cannot advise about policies? The same happens in most countries, Spain among them.' Maria Pazos

⁽⁴⁾ See paper of Thera van Osch (2013) in list of resources referred to in Annex I.





'In my opinion, ... EIGE must be present in every EU political decision-making and monitoring organism. It seems necessary for all the directorates-general to establish strong and stable relationships with EIGE, as they do with the European Court of Auditors and the European Anti-Fraud Office (OLAF), among others.' Gloria Alarcón García

Conclusions



'No matter how we categorise it, it is crucial to recognise that the difference existing between men and women continues to be one of the world's strongest markers for disadvantage. It is one of the deepest and most pervasive of all inequalities.' Sandor Kaszas

There are a number of conclusions that can be drawn from the discussion, which revealed a good deal of frustration at the way GM is (mis)understood and inadequately implemented across Europe. Since monitoring and supplying information on GM is an important part of EIGE's role, lessons learned from the discussion should be useful in guiding activities in the forthcoming period.

Despite a wide distribution of invitations and the fact that institutional capacities and methods for GM are relevant to a very large number of stakeholders, including EU, national and local policymakers and administrations, equality bodies, women's organisations and NGOs, active participation in the discussion was relatively low. This may reflect the complexity of the issue or its failure to touch people's everyday lives.

Contributions came in the end from a diverse selection of stakeholders, ranging from those actively involved in the technical processes of making GE work across government sectors, to researchers and academics, who tended to be more sceptical about mainstreaming progress so far. When participants were asked for practical cases of GM in action, there were few positive examples. However, most of them expressed satisfaction at the information they obtained and at being able to talk about shared challenges found in different countries around Europe and beyond.

Several contributors were concerned that the term 'gender mainstreaming' in itself is complex and often hard for people to understand. The exchange of good practice and examples of successes would help to overcome this. There was a general consensus that stronger measures, including tighter legislation and penalty systems, are needed to force policymakers from the top down to take GM seriously. Training and gender awareness are fundamental ingredients for success. Perhaps it is necessary to focus on specific areas rather than spreading the strategy too thinly across all policies, and to start from local and regional levels where GM may be implemented more effectively.

The 2-day discussion came to the conclusion that equality is an unalienable human right, and that GM, for all its faults, remains one of the most promising ways to achieve it. Gender mainstreaming can also be a tool for growth and sustainability. But it needs to be backed by binding legislation and political commitment. Incentive systems and sanctions can both be employed to achieve this: the carrot and stick at the same time. Above all, it requires accountability, as well as monitoring, evaluation and reporting systems, and adequate resources.



Annex I — Resources

List of resources referred to or made available on the EuroGender platform during the discussion

Written materials

- 1. African Development Bank, Mainstreaming gender equality: A road to results or a road to nowhere? http://eurogender.eige.europa.eu/documents/mainstreaming-gender-equality-road-results-or-road-nowhere
- 2. Benschop, Y. and Verloo, M., Sisyphus' sisters: Can gender mainstreaming escape the genderedness of organizations? http://eurogender.eige.europa.eu/documents/benschop-y-verloo-m-sisyphus-sisters-can-gender-mainstreaming-escape-genderedness
- 3. Daly, M., Gender mainstreaming in theory and practice http://www.uaf.edu.pk/faculties/social_sci/courses/gender_and_development/05.pdf
- 4. European Commission, Manual for gender mainstreaming http://eurogender.eige.europa.eu/documents/manual-gender-mainstreaming
- 5. 'Gender equality de facto as a contribution to "Reaching Europe 2020" targets: the effectiveness of institutional mechanisms', presentation, EIGE, 13 September 2013, Vilnius http://eurogender.eige.europa.eu/sites/default/files/EIGE_Presentation_HLG_Vilnius_Virginija.pdf
- 6. Hafner-Burton, E. M. and Pollack, M. A., Mainstreaming gender in the European Union: Getting the incentives right http://eurogender.eige.europa.eu/documents/em-hafner-burton-ma-pollack-mainstreaming-gender-european-union-getting-incentives-right
- 7. Lombardo, E., Meier, P. and Verloo, M., Policymaking and gender http://eurogender.eige.europa.eu/documents/lombardo-e-meier-p-verloo-m-policymaking-and-gender
- 8. 'Report on institutional capacity for gender mainstreaming in the 28 Member States of the European Union: institutional capacity assessment report', to be published by EIGE (5)
- 9. 'Report on institutional capacity for gender mainstreaming in the 28 Member States of the European Union: gender mainstreaming methods and tools', to be published by EIGE
- 10. 'Review of institutional capacity and effective methods, tools and good practices for mainstreaming gender equality within the European Commission and the EU Member States', PowerPoint presentation, to be published by EIGE
- 11. 'Review of the implementation of the Beijing Platform for Action in the EU Member States Institutional mechanisms for the advancement of gender equality', to be published
- 12. Walby, S., Gender mainstreaming: Productive tensions in theory and practice http://eurogender.eige.europa.eu/documents/s-walby-gender-mainstreaming-productive-tensions-theory-and-practice
- 13. Williams, M., Sandler, J., Johnsson-Latham, G. and Win, E., Gender mainstreaming: Can it work for women's rights? http://eurogender.eige.europa.eu/documents/gender-mainstreaming-can-it-work-womens-rights

Video

Interview with Joanne Sandler http://eurogender.eige.europa.eu/multimedia/videos/joanne-sandler-gender-mainstreaming

van Osch, T., 'How to support EU Member States to improve their capacities for gender mainstreaming? Practical recommendations for EIGE, inspired by the expert meeting 14 and 15 October 2013', 2013 (EIGE-OQ Consulting BV)



Additional references provided by participants

- 1. Belgian federal administration, 'Manual for the application of gender budgeting' http://igvm-iefh.belgium.be/fr/binaries/Manual%20gender%20budgeting_tcm337-120670.pdf
- 2. European Commission, 'Mid-term review of the strategy for equality between women and men (2010–15)', SWD(2013) 339 final http://ec.europa.eu/justice/gender-equality/files/strategy_women_men/131011_mid_term_review_en.pdf
- 3. European Parliament FEMM committee http://www.europarl.europa.eu/committees/en/femm/events.html?id=workshops
- 4. European Social Fund, EQUAL guide on gender mainstreaming http://ec.europa.eu/employment_social/equal_consolidated/data/document/gendermain_en.pdf
- 5. Gender budgeting in practice http://www.vlada.cz/assets/ppov/rada-pro-rovne-prilezitosti/oddeleni/dokumenty/Gender-Budgeting-2007.pdf
- 6. 'Gertrud Åström firmly believes in the fundamental importance of gender mainstreaming as a sustainable approach to gender equality' http://eige.europa.eu/content/gertrud-astrom
- 7. 'In-house seminar on gender budgeting Austria' http://eige.europa.eu/content/inhouse-seminar-on-gender-budgeting
- 8. 'Report on the 2013 budget of the Autonomous Community of Andalusia' http://www.juntadeandalucia.es/haciendayadministracionpublica/planif_presup/genero/informe/informe2013/Re-sEj2013-ENGLISH.pdf
- 9. The 3R method http://includegender.org/how/3r-method
- 11. UNECE, Developing gender statistics: A practical tool http://www.unece.org/fileadmin/DAM/stats/publications/Developing_Gender_Statistics.pdf
- 12. Weinmann, U., 'Implementation of gender budgeting in the federal state of Berlin' http://www.berlin.de/imperia/md/content/sen-gender/implementation_of_gender_budgeting_in_the_federal_state_of_berlin.pdf?start&ts=1202818542&file=implementation of gender budgeting in the federal state of berlin.pdf
- 13. WHO, 'What do we mean by "sex" and "gender"?' http://www.who.int/gender/whatisgender/en
- 14. Women and political decision-making EIGE online discussion resources http://eurogender.eige.europa.eu/sites/default/files/W%26D_Toolkit_V1.pdf



Annex II — Transcript

Link to the online discussion transcript:

http://eurogender.eige.europa.eu/sites/default/files/Institutional%20Capacity%20and%20Effective%20Methods%20for%20Gender%20Mainstreaming.pdf

Annex III — List of participants

Name	Organisation	Country
Agata Czarnacka	Independent researcher	Poland
Barbara	Researcher and activist on women's human rights	Hungary
Benedetta Magri	International Labour Standards, Rights at Work and Gender Equality	Italy
Christina Andersson	World Peace and Spiritually Conference in association with World Peace Foundation and VoWW Voices of Women	Belgium
Gloria Alarcón García	Department of Spanish Tax System and Public Finance, Faculty of Economics (University of Murcia)	Spain
Erika Schulze	European Parliament, Policy Department on Citizens' Rights and Constitutional Affairs	Belgium
Fatima Duarte	Commission for Citizenship and Gender Equality (CIG)	Portugal
Jeroen Decuyper	Belgian Federal Institute for the Equality of Women and Men	Belgium
Katarzyna Pabijanek	European Institute for Gender Equality (EIGE)	Lithuania
Kate Holman	European Service Network (ESN)	Belgium
Maria Pazos	Research area on gender and public policies at the Institute for Fiscal Studies (Ministry of Finance)	Spain
Maria José Carrilho	Statistics Portugal (INE)	Portugal



Mehmood ul Hassan	UNDP initiative in Pakistan	Pakistan
Priya Alvarez	European Institute for Gender Equality (EIGE)	Lithuania
Sandor Kaszas	Social sciences researcher	Hungary
Sara Slana	European Institute for Gender Equality (EIGE)	Slovenia
Stanimira Hadjimitova	Gender project for Bulgaria Foundation	Bulgaria
Tamara Šterk	Office for Gender Equality, Government of the Republic of Croatia	Croatia
Thera Van Osch	OQ Consulting BV	The Netherlands
Veronika Bartha Toth	Researcher and lecturer	Hungary

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