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ReGEM

Regional Gender Equality Measurement in the EU

Jean Monnet Project

Regional Gender Equality Measurement in the EU/ ReGEM

Final Event – 27.05.2022

Gender equality in the EU strategies

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EU Cohesion Policy on Gender Equality

The gender dimension in Cohesion Policy

2020/2040(INI)

PDF

The gender dimension in Cohesion Policy

⊖ Basic information

Basic information PDF

2020/2040(INI)

Status

INI - Own-initiative procedure

Procedure completed

Subject

4.10.04 Gender equality

4.70.02 Cohesion policy, Cohesion Fund (CF)

[https://oeil.secure.europarl.europa.eu/oeil/popups/ficheprocedure.do?lang=en&reference=2020/2040\(INI\)](https://oeil.secure.europarl.europa.eu/oeil/popups/ficheprocedure.do?lang=en&reference=2020/2040(INI))

The gender dimension in Cohesion Policy

⊖ Key events

Key events 

16/04/2020	Committee referral announced in Parliament		
22/04/2021	Vote in committee		
05/05/2021	Committee report tabled for plenary	A9-0154/2021	Summary
07/06/2021	Debate in Parliament		
08/06/2021	Results of vote in Parliament		
08/06/2021	Decision by Parliament	T9-0276/2021	Summary
08/06/2021	End of procedure in Parliament		

The European Parliament adopted by 390 votes to 82, with 212 abstentions, a resolution on the gender dimension in cohesion policy.

Members considered that gender mainstreaming should be implemented as a horizontal principle in all EU programmes, activities, measures and actions, as well as in all EU-funded projects and policies, including cohesion policy.

The role of cohesion policy in promoting gender equality

- Parliament stressed the importance of cohesion policy in promoting equality between people and between regions, including gender equality, and in implementing the European strategy for gender equality. It recommended that Member States take gender equality measures into account in the process of designing and validating programmes and identify, for each programming phase, priority areas that contribute to gender equality and sustainable development.
- Members stressed the need to adopt a gender equality strategy with clear ambitions and objectives at national and regional level and to develop awareness raising programmes on the benefits of gender equality and equal opportunities for socio-economic growth and sustainable development. It called for a strengthened work-life balance strategy to promote gender equality.

The role of cohesion policy in promoting gender equality

- Members also called for increased skills, training and capacity building for managing authorities and implementing partners on the gender dimension of the Structural Funds.
- Programme stakeholders and monitoring committees should be provided with clearer indicators on the effectiveness of programmes when it comes to the implementation of the gender perspective in concrete projects, especially in ERDF interventions, given the potential of the ERDF/Cohesion Fund to bridge the gap that women still face, especially with regard to female entrepreneurship and the digital sector.
- Part of the Cohesion Policy funds should be dedicated to support women in poverty, women at risk of poverty, single mothers, women with disabilities and women victims of violence

Impact of the COVID-19 crisis

- The COVID-19 crisis has underlined the crucial role played by public services, social infrastructure and the healthcare sector in ensuring social and economic resilience. It has further highlighted the role played by women as primary carers in formal and informal settings and the value this creates for society: 80% of all care in the EU is provided by informal, often unpaid, carers, 75% of whom are women.
- Members called on Member States to prioritise the funds available under cohesion policy for care provision to meet the growing demand for care facilities, but also to effectively tackle the gender gap in employment, the resulting pay and pension gaps and labour market segregation.
- Cohesion policy should also be used to support equal access to training and employment for women and men, to implement positive action to bridge the digital gender gap and to support the just, green and digital transitions.

Gender equality in post-2020 cohesion policy

Welcoming the addition of gender mainstreaming as a cross-cutting priority of the new Multiannual Financial Framework (MFF) and as a cross-cutting principle of the new Common Provisions Regulation, Parliament recommended:

- the introduction of clear and concrete targets and requirements on gender equality objectives and for greater opportunities and equality between men and women to be introduced in all post-2020 programmes, with specific and interdisciplinary measures to be translated into all operations;
- the development of a national gender equality strategy with clear objectives and targets to underpin cohesion policy interventions;
- the introduction of ex-ante and ex-post gender impact assessments as part of Member States' evaluations of how funds are spent and whether gender equality objectives are actually met;

Gender equality in post-2020 cohesion policy

- the introduction of sex-disaggregated data collection methods in the Member States in order to be able to properly analyse the differences between men and women;
- strengthening the criteria for gender mainstreaming at the project selection stage by giving a higher scoring and requiring more concrete actions.

Given that the COVID-19 pandemic has led to a surge in reported cases of domestic violence, Members called on the Council to ratify the Istanbul Convention and on the Commission and Member States to allocate funding under cohesion policy and implement programmes to prevent and combat violence against women.



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Research for REGI Committee

Gender Dimension of the EU Cohesion Policy

Gender Dimension of the EU Cohesion Policy

STUDY/IN-DEPTH ANALYSIS

Requested by the REGI committee



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



Abstract

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

In detail, the study considers how gender equality has been mainstreamed in ESF and ERDF in the programming, implementation, and monitoring phases with focus on eight selected country case studies. It also provides an assessment of the present and future challenges together with policy indications from relevant stakeholders at both European and national level.



Policy Department for Structural and Cohesion Policies
Directorate-General for Internal Policies
PE 629.185 - December 2018



Gender Dimension of the EU Cohesion Policy

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

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

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

Gender Dimension of the EU Cohesion Policy

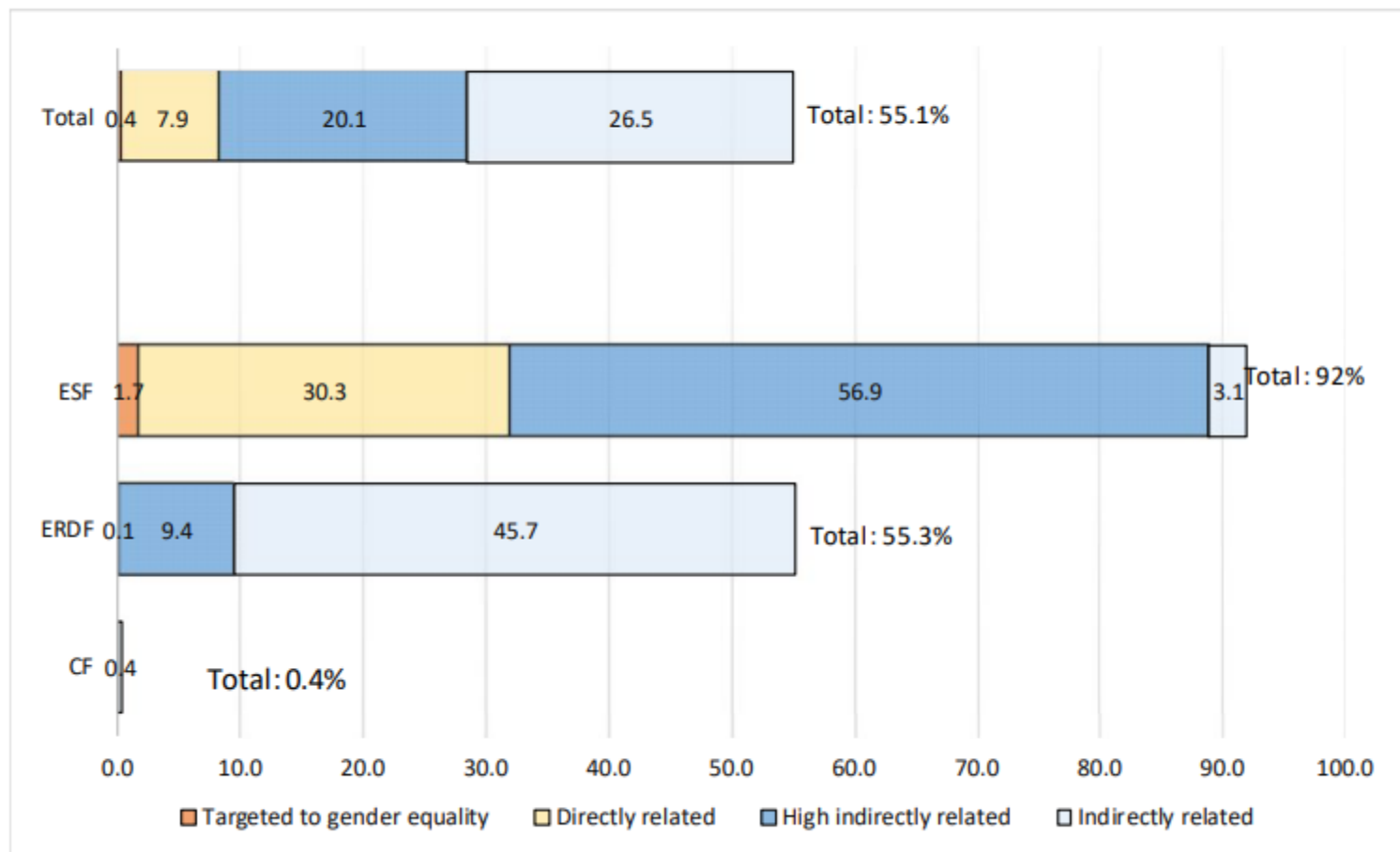
Estimations based on financial data available in the Open Cohesion database show that the overall financial allocations on intervention fields that could potentially affect gender equality, directly or indirectly, represent 55.1% of the total amount.

Almost all the ESF measures could affect gender equality (92 %), and a significant share of ERDF measures could directly or indirectly affect gender equality (55.3 %).

The proportion of allocations in measures potentially related to gender equality is particularly high in Northern and Continental European countries. The few available data also show that EUR 5,679 million has been planned for the ESF gender equality cross-cutting objective in 20 MSs out of 28, while only 12 MSs planned allocations in the intervention field directly targeted to 'gender equality in all areas', for a total of EUR 1,590 million.

Gender Dimension of the EU Cohesion Policy

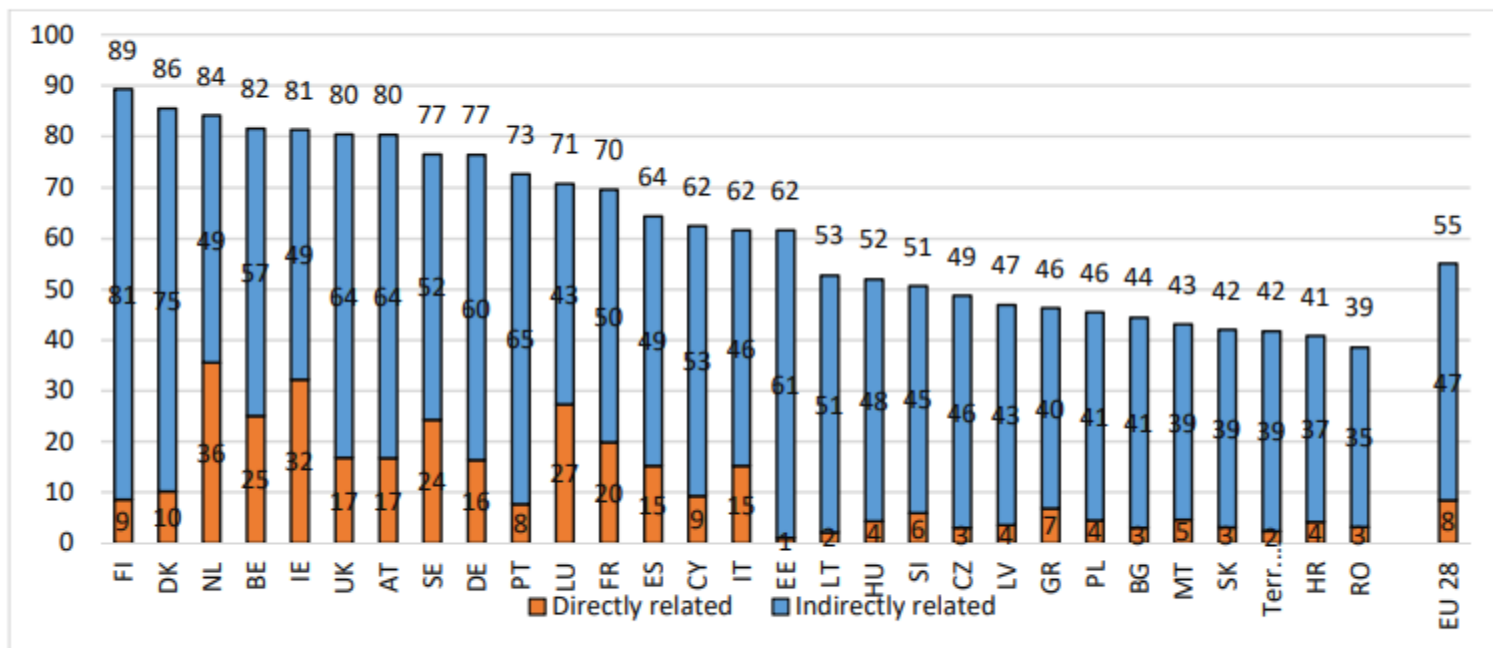
Figure 3: EU allocations 2014-2020 by gender equality relation and by fund, percentage of total allocations by fund



Source: calculation on Open Cohesion Data, ESIF 2014-2020 categorisation ERDF-ESF-CF - planned (5 November 2018 update).

Gender Dimension of the EU Cohesion Policy

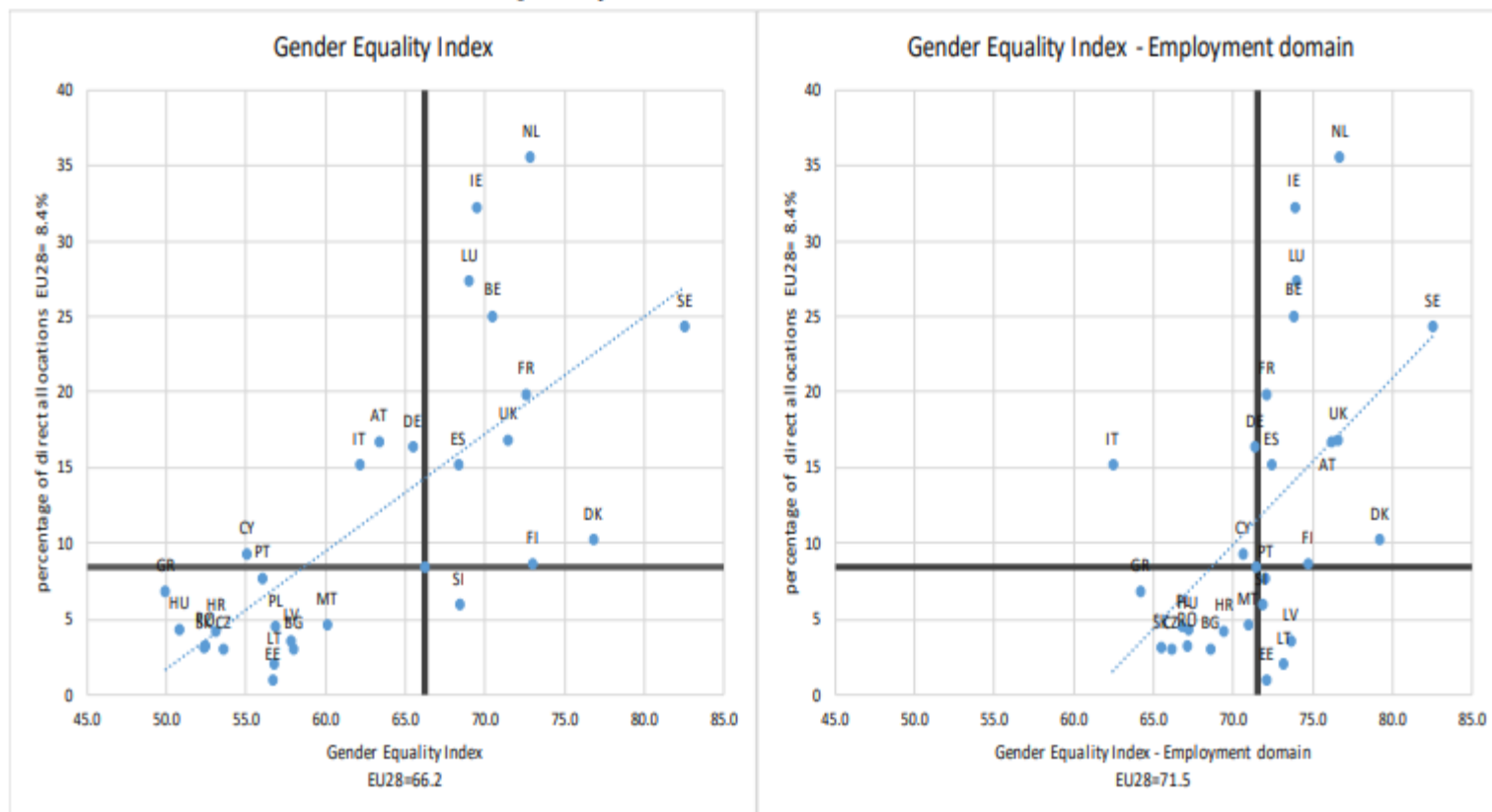
Figure 4: EU allocations 2014-2020 directly/indirectly related to gender equality by country, percentage of total allocations



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

Gender Dimension of the EU Cohesion Policy

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



Source: Calculation on Open Cohesion Data, ESIF 2014-2020 categorisation ERDF-ESF-CF - planned (5 November 2018 update) and EIGE Gender Equality Index.

Gender Dimension of the EU Cohesion Policy

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

Many respondents confirm that a gender equality perspective is lacking in national and regional programmes and, especially in the case of the ERDF, investments have not been prioritised to have a gender equality impact.

Almost two-thirds of the respondents state that gender equality was mainly addressed in the programming phase and much less in the project implementation and monitoring phases, especially in ERDF programmes.

Gender Dimension of the EU Cohesion Policy

The limited attention to gender equality issues is reflected in the pessimistic perceptions on the likely achievements of CP in gender equality. All the interviewed stakeholders highlight the importance of Cohesion Policy funding, regulations and tools in supporting attention to gender equality also for national and regional policies, and underline the need to address some critical points in order to enhance its effectiveness for gender equality:

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

Gender Dimension of the EU Cohesion Policy

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

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

Gender Dimension of the EU Cohesion Policy

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

Gender Dimension of the EU Cohesion Policy

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

- the introduction of compulsory requirements for gender equality in all the post-2020 Operational Programmes with specific and transversal gender equality measures in all funds, as well as specific obligations (e.g. in selection criteria and monitoring systems), and binding guidelines to enhance compliance;
- maintaining the ex ante requirement of developing national gender equality strategies to enhance synergies and improve CP's effectiveness and added value;
- supporting the creation of effective partnerships with gender equality representatives from civil society;

Gender Dimension of the EU Cohesion Policy

- developing gender-related tools, guidelines and training programmes tailored to the specific policy domains addressed by CP, with concrete examples of how to implement a gender perspective;
- creating and/or strengthening gender equality coordination, monitoring, and technical assistance bodies to support gender mainstreaming in all policy domains of Cohesion Policy and all programme phases;
- ensuring a strong political commitment to gender equality at European and national/regional level, in order to mainstream the attention and commitment of national and local Cohesion Policy stakeholders.



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Gender Equality as EU strategy

Legal framework on gender equality

Equality between women and men is recognized by the EU as a fundamental principle, a core value of the EU, and a necessary condition for the achievement of the EU objectives of growth, employment, and social cohesion.

The principle of gender equality has deep historical roots. It found its legitimacy in Article 119 of the EEC (Treaty of Rome, 1957).

The interest in the issues of gender equality has grown over time, moving from an economic perspective aimed at improving equal treatment for men and women in the workplace to a new dimension aimed at trying to protect women not only professionally but also socially, and in general in all those areas in which gender inequality may occur.

Legal framework on gender equality

Since 1995, the Commission adopted a dual approach toward realizing gender equality. This approach involves:

- the implementation of specific measures to eliminate, prevent or remedy gender inequalities;
- the integration of the gender dimension in all policies (*Gender Mainstreaming*). The strategy of gender mainstreaming has several benefits, it places women and men at the heart of policies, involves both genders in the policymaking process, leads to better governance, makes gender equality issues visible in the mainstream of society, and, finally, considers the diversity among women and men (Council of Europe, 1998).

Tools for gender mainstreaming

Since the Beijing Conference in 1995 gender mainstreaming has been adopted almost universally as the strategy by which gender equality is to be pursued.

Signing up for a strategy is just the first level of political commitment and is not sufficient to reach the goal of gender equality; practical actions in all government policy areas at all levels are needed. For this reason, in 2006 the Council calls on the Member States to strengthen efforts to mainstream gender equality in all relevant areas by applying tools and methods, such as:

- Gender Budgeting;
- Gender Equality Plan (GEP);
- Gender Impact Assessment (GIA).

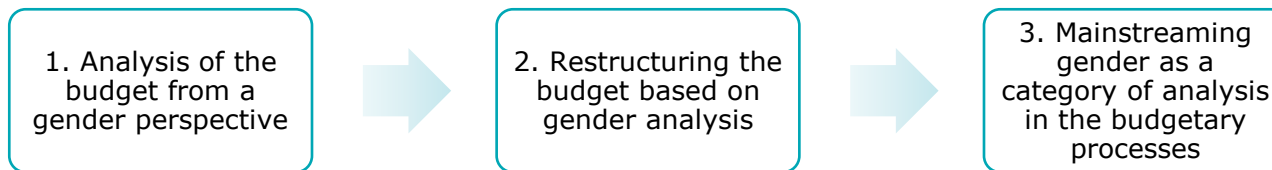
Gender Budgeting

Gender budgeting was developed in the mid-1980s, but its dissemination was pushed forward in 1995 with the “Beijing Platform for Action”. It is on that occasion that gender budgeting was presented as a necessary tool to support public and private institutions.

What is a Gender budgeting?

“Gender budgeting is an application of gender mainstreaming in the budgetary process. It means a gender-based assessment of budgets, incorporating a gender perspective at all levels of the budgetary process and restructuring revenues and expenditures to promote gender equality.” (Council of Europe Committee of Ministers Recommendation on Gender equality standards and mechanisms and Explanatory Memorandum, 2017)

The three stages of the gender budgeting process:



Gender Equality Plan - GEP

What is a Gender Equality Plan?

Gender Equality Plan is “a set of commitments and actions that aim to promote gender equality in an organization through a process of structural change.” (EIGE)

In the specific context of research organizations and higher education institutions the EU Commission defines three different objectives for the GEP:

- conduct impact assessment/audits of procedures and practices to identify gender bias;
- implement innovative strategies to correct any gender bias;
- set targets and monitor progress via qualitative and quantitative indicators.

Hence, the EU Commission promotes gender equality actions and the integration of a gender dimension in universities and research institutions, but also in Horizon 2020 program and projects. Currently, the GEP represents a basic requirement for participation in the Horizon Europe program.

Gender Equality Plan - GEP

The process of developing and implementing a GEP can be broken down into five different steps:

1. the first step consists of a preliminary phase that concerns the familiarization of the GEP concept and how it fits with the specific organization and its context;
2. the second step consists of an assessment of the status quo of gender equality within the organization. This step requires sex-disaggregated data and organizational procedures aimed at detecting any gender inequalities and their causes (*Analysis phase*);
3. the third step concerns the setting of the objectives and targets, and the definition of the actions and measures for the GEP (*Planning phase*);
4. in the fourth step the previously planned activities are implemented (*Implementation phase*);
5. in the fifth step the progresses achieved against the aims and objectives are assessed (*Monitoring and Evaluation phase*). This step allows improvements to interventions defined in the planning phase.

Gender Impact Assessment - GIA

Impact evaluation can be applied to planned, ongoing, or completed projects, programs, or policies; hence the assessment can be done before or after a program is implemented.

What is a Gender Impact Assessment?

The GIA represents a policy tool for the screening of a given policy proposal “to detect and assess its differential impact or effects on women and men, so that these imbalances can be redressed before the proposal is endorsed.” (Council of Europe Committee of Ministers Recommendation on Gender equality standards and mechanisms and Explanatory Memorandum, 2017)

Therefore, the GIA must be applied in the early stage of any policymaking, and for this reason, it is defined as an ex-ante evaluation method.

Gender Impact Assessment - GIA

It is possible to identify five phases or steps of the GIA process:

1. the first step investigates the purpose and scope of the policy proposal;
2. the second step identifies the gender relevance of the policy proposal to beneficiaries and stakeholders;
3. the third phase consists of a Gender-sensitive analysis. The purpose of this phase is twofold: first, the gender-sensitive analysis seeks to understand the current situation for the target groups and how this situation could evolve without public intervention; then, the analysis attempts to measure how the planned intervention should change the existing situation;
4. the fourth step consists of measuring the effects of the planned policy and identifying if the gender impact is positive, neutral, or negative;
5. in the last step, the evidence that emerged is collected, and specific proposals are made for improving the policy to be implemented.

Ex-post evaluation of the gender impact

Other methodologies can be applied to evaluate the program outcomes once the program has been implemented. Ex-post evaluation measures the actual outcomes of a program or project; hence it reflects reality and does not represent a prediction.

It is always recommended to implement ex-ante and ex-post analysis and compare predictions with estimations.

Ex-post evaluation methods present the problem of counterfactuals:

$$\beta = (Y|P = 1) - (Y|P = 0)$$

The impact of a program (β) can be defined as the difference between what is observed in the presence of the intervention ($Y|P = 1$) and what would have been observed in its absence ($Y|P = 0$). It is worth noting that while the first term of this comparison is observable, the second term is hypothetical.

Ex-post evaluation of the gender impact

Therefore, the counterfactual ($Y|P = 0$) has to be estimated.

To this end, it is necessary to identify a group of program participants (treatment group), and a group of non-participants (comparison or control group) that are statistically identical if the program does not exist. In this way, if the two groups have the same characteristics, it is possible to affirm that the program alone contributed to the differences in the outcome (Y) between the two groups.

Ex-post evaluation approaches:

- Randomization;
- Regression Discontinuity Design (RDD);
- Difference in Differences (DiD);
- Matching.

Randomized Selection Methods

In randomized evaluation, the selection process takes place by randomly assigning units to the treatment and control groups.

Main benefits:

- ensures that the selection bias is zero;
- ensures that, with many observations, the treatment and control groups have the same distribution of observables and unobservables;
- ensures internal and external validity.

$$Impact = \Delta Y = \bar{Y}_{treated} - \bar{Y}_{control}$$

Randomized assignment represents a fair allocation rule when there is an excess of demand to enroll in the program and there is a limited number of program places available. Alternatively, this method can be used in pilot projects or programs with the specific purpose of evaluating its effectiveness (e.g., clinical drug testing).

Regression Discontinuity Design - RDD

This method aims to determine the causal effects of interventions by assigning a cutoff or threshold above or below which an intervention is assigned. The difference in the average outcome for the treaties that are immediately below the threshold and that of the non-treated ones immediately above the threshold - identifies the effect of the policy.

Main features:

- requires a large evaluation sample, since it estimates the policy effect only around the cutoff score;
- guarantees internal validity;
- has limited external validity since the results obtained cannot be generalized to the entire population but only locally in the neighborhood around the eligibility threshold.

Difference in Differences - DiD

Measures the impact of the program intervention by the difference in the before-after change in outcomes between participants and nonparticipants.

Main features:

- requires either longitudinal or repeated cross-section data on both participants and nonparticipants;
- ensures a good estimation of the counterfactual, even if a selection bias occurs when comparing participants and non-participants, because the choice to enroll or not in a program is often determined by differences in the starting conditions of the eligible observations.

Matching

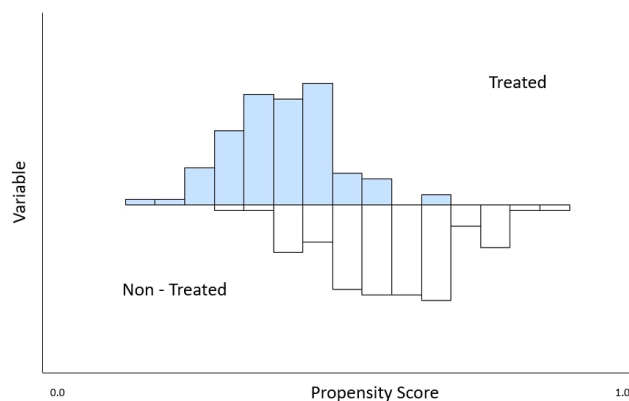
Matching is a widely-used method of evaluation that compares the outcomes of program participants with the outcomes of similar, matched nonparticipants. The most popular approach is the Propensity score matching that match on conditional probability of participating in the program.

Main features:

- it requires a large dataset with extensive information on background characteristics for all units;
- it does not ensure that all enrolled units matched non-enrolled ones;
- it assumes that there are no unobservable characteristics.

Matching

Let's consider a program whose purpose is to provide financial support for the unemployed. Figure below shows the distributions of the propensity score, that is the probability of the units to enroll in the program - respectively for all the treated (light blue distribution), and all the non-treated units (white distribution).



The propensity score distributions do not overlap perfectly, indeed there is a lack of common support between treated and non-treated. This implies that matching methods allow obtaining a robust estimation of the average effect of the treatment limited to the subset of treated and untreated units that lie in the common space of the propensity score index.

Conclusions

Among the main purposes of this contribution are summarizing the main interventions on gender equality, illustrating the operational tools that effectively contribute to reducing gender inequalities, and finally introducing the main methods of policy evaluation that promote gender equality. By now, it should be clear the complexity of the impact evaluation processes and the relevance of their design, even before the implementation of the policy itself.

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