



# Manual for gender mainstreaming



**employment,  
social inclusion  
and social protection  
policies**



European Commission





# **Manual for gender mainstreaming**

## **employment, social inclusion and social protection policies**

Directorate-General for Employment, Social Affairs and Equal Opportunities  
Unit G1

Manuscript completed in April 2008

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Cataloguing data can be found at the end of this publication.

Luxembourg: Office for Official Publications of the European Communities, 2008

ISBN 978-92-79-09266-4  
DOI 10.2767/19842

*Printed in Luxembourg*

PRINTED ON WHITE CHLORINE-FREE PAPER

# PREFACE

The promotion of gender equality is at the heart of European social and economic policies. Despite progress made over the past years, inequalities between women and men still remain in a number of domains.

Women's employment rate lags behind that of men (57,2% versus 71,6% for 2006), and women continue to predominate in certain lesser valued and remunerated sectors and professions (the gender pay gap is at 15%). It is also women who are more often employed in part-time jobs (31,4% versus 7,8% for 2007) and are under-represented amongst managers in companies and decision-makers in the political and economic domains. Notable is women's greater exposure to poverty, especially of those in their retirement (5 p.p. gender gap), as well as of single mothers and women members of certain disadvantaged groups such as ethnic minorities and immigrants.

The Commission has committed itself in its Roadmap for equality between women and men<sup>1</sup> to undertake a number of actions in the 2006-2010 period, in order to accelerate progress and achieve real equality between the sexes. The actions proposed by the Roadmap cover six priority areas: achieving equal economic independence for women and men; enhancing reconciliation of work, private and family life; promoting equal participation of women and men in decision-making; eradicating gender-based violence and trafficking; eliminating gender stereotypes in society; and promoting gender equality outside the EU. The Roadmap also underlines the need for improving governance and confirms the dual approach of gender equality based on gender mainstreaming (the promotion of gender equality in all policy areas and activities) and specific measures. The European Pact for Gender Equality adopted by the Spring European Council in 2006 also encourages Member States to improve gender mainstreaming.

Explicitly, "gender mainstreaming involves not restricting efforts to promote equality to the implementation of specific measures to help women, but mobilising all general policies and measures specifically for the purpose of achieving equality by actively and openly taking into account at the planning stage their possible effects on the respective situation of men and women (gender perspective). This means systematically examining measures and policies and taking into account such possible effects when defining and implementing them"<sup>2</sup>.

In the Roadmap, under the priority area of achieving equal economic independence between women and men, the Commission committed itself to monitor and strengthen gender mainstreaming in the Integrated Guidelines for Growth and Jobs and in the Open Method of Coordination for Social Inclusion and Social Protection, including by preparing gender equality manuals for actors involved in these processes.

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1 COM (2006) 92.

2 COM (1996) 67.

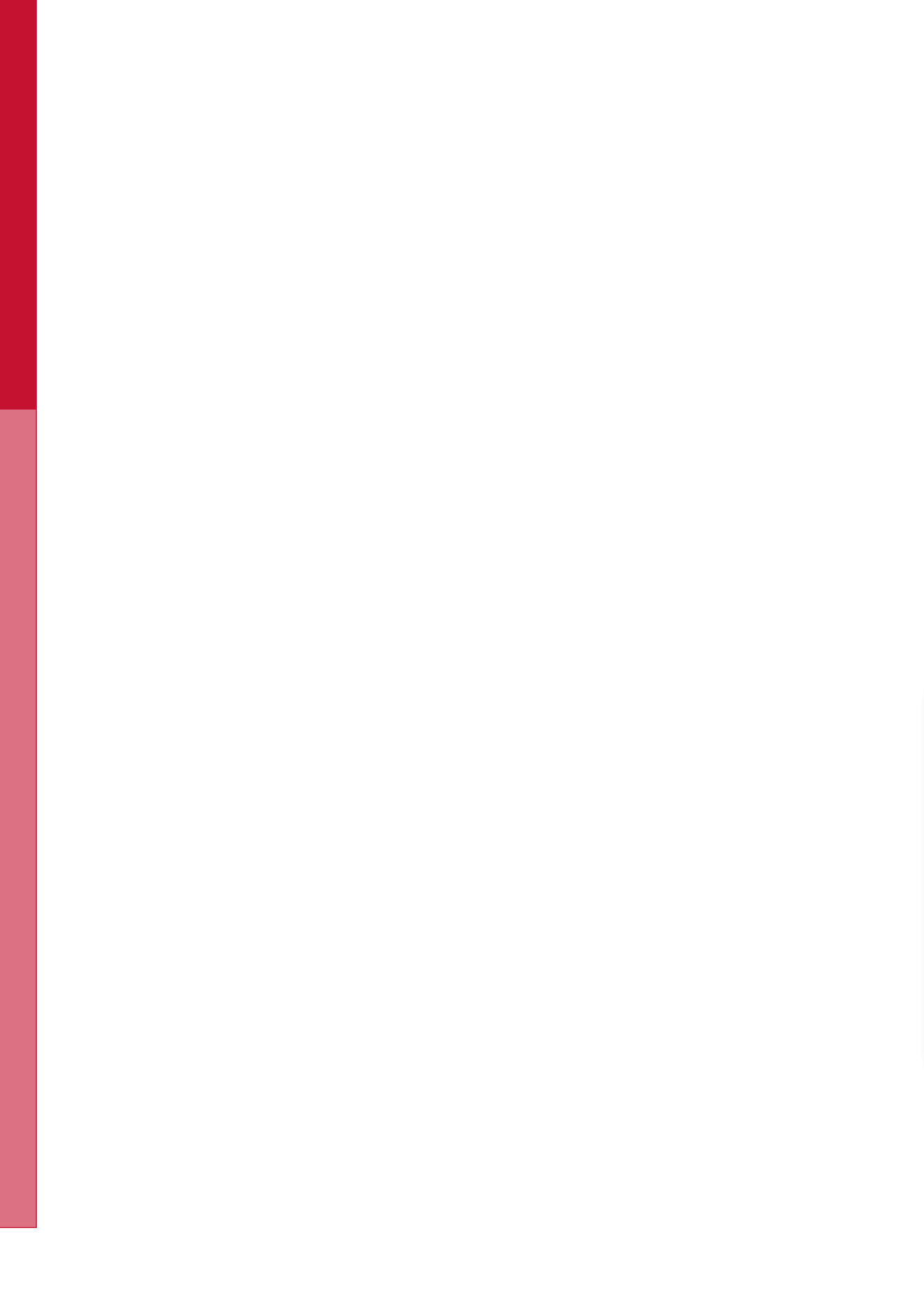
This manual is the Commission's response to this commitment. It provides both an easy-to-grasp explanation of what gender mainstreaming is, and practical, hands-on advice to policy-makers on how to implement it on the one hand in employment and on the other hand in social inclusion and social protection policies. The general method, however, can be applied to any policy field and it is valid beyond the timeframe in which this manual is set.

The manual offers a four-step method, which can be easily followed by policy-makers: getting organized, learning about gender differences, assessing the policy impact and redesigning policy. It is, however, to be noted that the first two steps require the effective functioning of specific organizational structures to promote gender equality and the existence of mechanisms to ensure the availability of sex-disaggregated statistics. Success of the last two steps is in turn dependent upon the day-to-day implementation of the method and the political will to do so.

It is the hope of the Commission that this manual will provide an effective guide to all actors, especially those working on employment, social inclusion and social protection policies in the Member States, to better implement gender mainstreaming in these policies and thereby better serve the needs of citizens, both women and men.

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# Manual for gender mainstreaming employment policies



# 1. INTRODUCTION

Gender equality is a fundamental right, a common value of the EU, and a necessary condition for the achievement of the EU objectives of growth, employment and social cohesion. One of the main challenges for the EU is to increase women's employment, to improve women's situation on the labour market and eliminate gender gaps.

Over the last few years, important progress have been realised as regards the employment situation of women. Women's employment rate has risen sharply (from 51.4 % in 1997 to 57.1 % in 2006) and is now closer to the Lisbon target (60 % in 2010). This progress should not obscure the clearly unfavourable situation of women on the labour market, where major gaps in relation to men persist.

The gap in employment rates between women and men at EU level was still close to 15 percentage points in 2006. Moreover, labour market segregation and inequalities in working arrangements are proving to be persistent, and this is reflected in a significant and stable gender pay gap. Women are often obliged to choose between having children or a career, due to the lack of care services, of flexible working arrangements, the persistence of gender stereotypes and an unequal share of family responsibilities with men. Progress made by women, including in key areas of the Lisbon Strategy such as education and research, are not fully reflected in women's position on the labour market. This is a waste of human capital that the EU cannot afford.

Gender equality has been a fundamental goal of the European employment strategy since its beginning. It is also seen as instrumental for progress towards the Lisbon objectives of growth and employment. The Employment Guidelines used during the Lisbon cycle 2005-08 underline that gender mainstreaming and the promotion of gender equality should be ensured in all actions taken. The need for specific actions to increase female participation and reduce gender gaps in employment, unemployment, and pay is also stressed.

This dual-track approach (specific actions and gender mainstreaming) has been reinforced in the European Pact for Gender Equality adopted by the European Council of March 2006. The Pact encourages Member States:

- to promote women's employment, reduce gender gaps and asks them to consider how to make welfare system more women's employment friendly;
- to adopt measures to promote a better work-life balance for all (Barcelona targets in childcare, care facilities for other dependents, promotion of parental leave);
- to reinforce governance through gender mainstreaming, notably by encouraging the Member States to include a perspective of gender equality in their National Reform Programmes.

However, the issues of gender equality and gender mainstreaming were not very visible in the National Reform Programmes 2005 and 2006 and the recognition of role and visibility of women's employment and gender equality seems to be declining<sup>3</sup>. For instance, the 2007 Joint employment report states that: "through the European Pact for Gender Equality, Member States were asked to include a perspective of gender equality when reporting on implementation. In spite of this, the promotion of female employment and systematic gender mainstreaming policies are rarely emphasised"<sup>4</sup>.

It also appears that some positive developments regarding gender equality are not reported by the Member States in their National Reform Programmes. It is therefore crucial, both for the Commission and the Member States, to revamp the gender equality perspective in the Lisbon Strategy, in compliance with the Treaty and EU political commitments.

In its Roadmap for equality between women and men (2006-10), the European Commission set as key priorities the economic independence of women and men and the reconciliation between work, private and family life. To this end, the European Commission committed to monitor and strengthen the gender aspect in the Strategy for growth and jobs, to adopt a communication to tackle the gender pay gap, to promote female entrepreneurship, to support Member States efforts to improve care services, etc.

In particular, the Commission planned to "**prepare in 2007 gender equality manuals for actors involved**" in the Lisbon process. The objective is to provide a methodological support to Member States and to help them to better include gender equality issues in their National Reform Programmes.

This manual has been prepared on the basis of a report by the Expert group on Gender, Social Inclusion and Employment (EGGSIE) which provides external expertise to the European Commission on gender issues. The report (still to be finalised) analyses the state of play of gender mainstreaming in the field of employment policies<sup>5</sup> and aims to present concrete examples of gender mainstreaming implemented over the last few years in the thirty countries covered (EU-27 and the EEA-EFTA countries). It shows that the European countries have undertaken a variety of initiatives, which are extremely valuable from a gender equality point of view. At the same time, it also stresses that gender mainstreaming is a long-term process and it is still at an initial stage. The Manual aims to be a step for a better implementation of the gender mainstreaming principle in Employment Policies and thus in the Lisbon strategy.

3 Rubery, J. D. Grimshaw, M. Smith & R. Donnelly (2006). *The National Reform Programmes and the gender aspects of the European Employment Strategy*. The coordinator synthesis report prepared for the Equality Unit, European Commission. University of Manchester.

4 JER (2007). Joint Employment Report 2006/2007. Council of the European Union, Brussels

5 Plantenga, J., Remery C. & J. Rubery (2007). Gender mainstreaming of employment policies – A comparative review of thirty European countries, European Commission. Luxembourg: Office for Official Publications of the European Communities

After a definition of the concept of gender mainstreaming, this manual proposes a four-step method (getting organized, learning about gender differences, assessing the policy impact and redesigning policy) to be implemented in every relevant policy. This method is then applied to four main fields that have been chosen in order to cover broadly all types of employment policies and all Employment guidelines: active labour market policies, pay and career policies, reconciliation (between work, private and family life) policies and flexicurity policies.

## 2. DEFINING GENDER MAINSTREAMING

Gender mainstreaming is often seen as an innovative concept, encompassing much more than 'traditional' equal opportunities policy.

The European Commission adopted the gender mainstreaming approach in 1996, not as a replacement for equal opportunities policy but as additional to it. It is thus an integrated approach: "Gender mainstreaming involves not restricting efforts to promote equality to the implementation of specific measures to help women, but mobilising all general policies and measures specifically for the purpose of achieving equality by actively and openly taking into account at the planning stage their possible effects on the respective situation of men and women (gender perspective). This means systematically examining measures and policies and taking into account such possible effects when defining and implementing them"<sup>6</sup>.

According to the Council of Europe, gender mainstreaming may be described as "the (re)organization, improvement, development and evaluation of policy processes, so that a gender equality perspective is incorporated in all policies, at all levels and at all stages by the actors normally involved in policy making"<sup>7</sup>.

Another interesting way to define gender mainstreaming is to distinguish between three types of gender equality strategies: tinkering, tailoring and transforming<sup>8</sup>:

- Tinkering refers to measures aimed at establishing formal equality between men and women, such as equal treatment legislation and mechanisms to ensure law enforcement. Examples at the EU level are the directives regarding equal pay and equal treatment in access to employment, training, promotion and working conditions. Tinkering is in fact one of the oldest strategies for promoting equal opportunities.

6 European Commission (1996), Incorporating equal opportunities for women and men into all Community policies and activities COM(1996) 67 final.

7 Council of Europe (1998), Gender mainstreaming: conceptual framework, methodology and presentation of good practices. Strasbourg.

8 Rees (1998). See also Stevens and Van Lamoen 2001.

- The second strategy is tailoring. As equal treatment does not automatically lead to equal outcomes, specific measures and facilities for women may be necessary. Examples are positive action programmes for women and the provision of childcare. Under this tailoring approach women are supposed to assimilate into the status quo, which is in itself not under discussion.
- The third strategy 'transforming' goes a step further by questioning the status quo (the mainstream) and assuming that a transformation of institutions and/or organizations may be necessary to establish gender equality. Thus, gender mainstreaming would result in adding this potential for transformation to the established gender equality policies of formal equality and positive action.

In terms of employment policy, gender mainstreaming implies that the policy takes the unequal position of men and women in the labour market explicitly into account.

### 3. THE FOUR STEPS OF GENDER MAINSTREAMING

Over recent years a variety of manuals 'how to gender mainstream' have been developed, often focusing at specific areas and/or directed at certain target groups. An example at the European level is the EQUAL Guide on gender mainstreaming that is written for those involved in national EQUAL programmes<sup>9</sup>. Another more recent example is the Gender Mainstreaming Manual, which is developed by the Swedish Gender Mainstreaming Support Committee<sup>10</sup>. Most manuals provide a framework or distinguish certain stages. For example, a useful framework for applying gender mainstreaming is provided in a manual for gender mainstreaming at universities<sup>11</sup>. They distinguish four toolkits or sets of instruments: 1) measurement and monitoring, 2) implementation and organization, 3) building awareness and ownership and 4) gender proofing and evaluation. In addition, useful information may be found in guides which describe the different stages of a gender impact assessment process<sup>12</sup>. Based on the literature and taking the specific area and stakeholders into account, a checklist for gender mainstreaming employment policies is developed, consisting of four steps, see box 1.

9 European Commission (2004). *EQUAL Guide on Gender Mainstreaming*. Brussels: European Commission. Downloadable at: [http://ec.europa.eu/employment\\_social/equal/data/document/gendermain\\_en.pdf](http://ec.europa.eu/employment_social/equal/data/document/gendermain_en.pdf)

10 Jämstöd (2007). *Gender mainstreaming manual*. Swedish Government Official Reports SOU 2007:15. Stockholm: Edita Sverige AB. Downloadable at: <http://www.sweden.gov.se/content/1/c6/08/19/82/3532cd34.pdf>

11 Stevens, I., & I. van Lamoen (2001). *Manual on Gender Mainstreaming at Universities*. Equal Opportunities at Universities. Towards a Gender Mainstreaming Approach. Leuven/Apeldoorn: Garant-Uitgevers

12 See for instance: Rubery, J. & C. Fagan (2000). *Gender impact assessment and European Employment Policy*. Downloadable at: [http://www.mbs.ac.uk/research/europeanemployment/projects/gendersocial/documents/GIA\\_Report.pdf](http://www.mbs.ac.uk/research/europeanemployment/projects/gendersocial/documents/GIA_Report.pdf)

## Box 1 The four steps of gender mainstreaming

**Getting organized.** The central focus in this first step is on implementation and organization, and building awareness and ownership.

**Learning about gender differences.** The aim of the second step is to describe gender inequality with regard to participation, resources, norms and values and rights, and to evaluate trends without policy intervention.

**Assessing the policy impact.** The third step is to analyse the potential gender impact of the policy with reference to participation, resources, norms and values and rights.

**Redesigning policy.** The fourth step is to identify ways in which the policy could be redesigned to promote gender equality.

The sections below provide some details on the above-mentioned four steps. The concrete examples given are stemming from the application (in the above-mentioned expert report) of this method to four different types of employment policies: active labour market policies, pay and career policies, reconciliation policies and flexicurity policies.

### Step 1: Getting organized

Implementation and organization, and building awareness and ownership may be regarded as important preconditions of successful gender mainstreaming. Implementation and organization of gender mainstreaming refers to the process of providing a structural and cultural basis for equal opportunities<sup>13</sup>. This includes formulation of objectives and targets, making a plan, drawing up a budget and defining responsibilities and accountability of the different actors involved. With regard to the budget, sufficient resources for implementation need to be made available. Moreover, the use of special (external) expertise might be considered. In addition, gender mainstreaming implies that all stakeholders involved in employment policy should take equal opportunities of men and women into account. In order to create a certain degree of gender awareness and expertise, training is essential. In addition, stakeholders should consider gender mainstreaming as part of their tasks and responsibilities. It is therefore important 'to build ownership' but different strategies may be adopted. In some cases all the team may be expected to take 'ownership' but where awareness levels are low it may be necessary initially to have a nominated person with specific knowledge and awareness within the policy making team or unit.

### Step 2: Learning about gender differences

A next step in the process of gender mainstreaming is the collection of relevant data on the position of women and men. A description of the actual situation is essential in order to assess actual gender (in)equality and

<sup>13</sup> Stevens, I., & I. van Lamoen (2001). Manual on Gender Mainstreaming at Universities. Equal Opportunities at Universities. Towards a Gender Mainstreaming Approach. Leuven/Apeldoorn: Garant-Uitgevers, p.52

to prioritise areas for attention. In addition, monitoring of the situation over time provides information on the trends in gender (in)equality. The European Commission<sup>14</sup> has identified in 1998 four dimensions to the assessment of gender inequality: participation, resources, norms and values and rights<sup>15</sup>. It is important to consider the initial situation from a dynamic and not solely a static perspective.

## Participation

Participation refers to the gender composition of the target group/population of the policy and implies the need to gather basic information such as the share of men and women in unemployment, among the disabled or among those with flexible contracts. Where policy measures specify particular groups of vulnerable persons, the possible differential impact on men and women should also be taken into account. Over recent years considerable progress has been made in improving the availability of gender segregated statistics, a development which facilitates this first step. Though statistics seem straightforward, it is also important to take measurement issues into account. For example, unemployment may be measured in several ways. Depending on the method, gender differences might vary from rather low to quite high.

## Resources

Gender differences may also occur regarding the access to/distribution of resources such as time, space, information and money, political and economic power, qualifications, transport, use of public services etc. In particular the unequal division of care responsibilities has a major impact on the distribution of resources. For example, with respect to active labour market policies, the fact that women bear the main responsibility for raising children should be taken into account. Availability of childcare is, therefore, very important to enable, in particular, women to be participants in the programmes. In the field of reconciliation policies a relevant issue is whether leave arrangements are paid or unpaid. Women are also more likely to be concentrated in the area of the labour market most influenced by national minimum wages and are therefore disproportionately affected by decisions to raise the national minimum by more or by less than the average rate of growth in earnings.

## Norms and values

Norms and values influence gender roles and the gender division of labour, and the attitudes and behaviour of women and men. They also account in part for the inequalities in the value attached to men and women or to masculine and feminine characteristics. It is essential to identify the role of policy measures in reinforcing social norms and values that maintain gender

<sup>14</sup> European Commission (1998) *A Guide to Gender Impact Assessment*, Office for Official Publications of the European Communities, Luxembourg

<sup>15</sup> Rubery, J. & C. Fagan (2000). Gender impact assessment and European Employment Policy. Downloadable at: [http://www.mbs.ac.uk/research/europeanemployment/projects/gendersocial/documents/GIA\\_Report.pdf](http://www.mbs.ac.uk/research/europeanemployment/projects/gendersocial/documents/GIA_Report.pdf)

inequality. Tax and benefit policies are, for example, often based on the principle of a male breadwinner household model. The move towards more individualized models may, regardless of the impact on participation rates, have an important symbolic value. Along the same line, policy focusing on a more equal sharing of paid and unpaid work – with men explicitly in a role of carer – might also contribute to a more equal set of norms and values.

## **Rights**

Rights pertain to direct or indirect sex discrimination, human rights, and access to justice in the legal, political or socio-economic environment. For example, are active labour market schemes open to the inactive (returners, not just benefit claimants) as well as to the unemployed who are entitled to benefits? If not then women may be less able than men to claim support for re-entering employment. In this respect it should also be taken into account that even where women have formal rights on the same basis as men, lack of facilities may restrict women's ability to exercise their rights to take up these opportunities. Similarly formal rights for men to participate in reconciliation measures will not necessarily be sufficient to promote gender equality in care work.

## **Step 3: Assessing the policy impact**

The third step requires an assessment of the potential gender impact of the policy with reference to participation, resources, norms and values and rights. An important issue regarding participation is that both quantitative as well as qualitative aspects should be taken into account. For example, programmes to create jobs may in particular concern women. This may be assessed as positive from a gender equality point of view. When, however, the job quality is problematic (e.g. in terms of working hours and pay), such programmes might reinforce gender inequality. With respect to access to resources, it is critical to take into account not only the impact on household resources but also the impact on individual resources. On the level of social norms and values, reconciliation policies should address men's involvement in domestic labour. If only women make use of reconciliation policies the traditional unequal division of unpaid work between men and women will be reinforced, thereby potentially reinforcing social norms in this respect. With regard to rights it is relevant to include the right to care as well as to undertake employment.

When assessing the impact of policy, it may be important to differentiate between particular groups of men and women such as ethnic minority groups, parents versus the childless, age groups, educational groups, regional groups etc. While measures to increase the participation rate might, for example, be effective for women from the dominant group, women from ethnic minority groups may require specific measures. In addition, a sound policy assessment should include indirect effects. Changes to gender relations outside as well as inside work may be one of the indirect effects to be looked for. A strong focus on part-time work could, for example, have the long term effect of reinforcing gender divisions of labour both in and outside work as women become more concentrated in sectors offering flexible employment. This example also illustrates the importance of distinguishing between short-term and long-term effects.



## Step 4: Redesigning policy

Where the policy is assessed to have a negative impact on gender equality or to be broadly gender neutral, it is essential to identify ways in which the policy could be redesigned to promote gender equality. The need for redesign is particularly strong where initial gender differences are high and have major impacts on women's life chances. Redesign does not necessarily imply fundamental changes. For example, regarding active labour market policies a rather simple but effective measure is to extend eligibility to all inactives. Providing facilities to support working parents also seems not too complicated. Other areas may be more complex. For example, reducing vertical and horizontal segregation calls for more extensive policies. Redesign may also require a multi-pronged approach involving more than one policy area or department. For example the public employment service may need to cooperate actively with the department responsible for the provision of childcare if women seeking employment are to have access to childcare to facilitate job search. Gender mainstreaming calls for a more joined up approach to policy design where employment policy is not developed in isolation from welfare provision and childcare services on the one hand or tax and benefit policies on the other hand.

## 4. GENDER MAINSTREAMING EMPLOYMENT POLICIES

In order to provide concrete examples, the four-step method explained above has been applied to four types of employment policies: active labour market policies, pay and career policies, reconciliation policies and flexicurity policies. These four types of policies have been chosen in order to cover all employment policies though some specific policies might be covered in several of these fields. These fields are normally broad enough to be applied to the employment guidelines, whatever the extent of the possible changes in the future.

In the sections below, each of the policy fields is defined, its possible impact in terms of gender equality is discussed and a specific box contains a list of relevant questions to consider in the process of gender mainstreaming.

The boxes and analysis presented below have been developed in the above-mentioned expert report on gender mainstreaming employment policies<sup>16</sup>. This report also provides some concrete examples of gender mainstreaming in the four policy fields developed in the Member States or in EEA-EFTA countries. The reader is therefore invited to consult this report for a more extensive presentation on the interactions between each policy fields and gender equality. It has to be noted that some of the steps (especially the last one which highly depend on the results of the three first steps) are sometimes similar from one policy field to another.

<sup>16</sup> Plantenga, J., Remery C. & J. Rubery (2007). Gender mainstreaming of employment policies – A comparative review of thirty European countries, European Commission. Luxembourg: Office for Official Publications of the European Communities

## 4.1 Active labour market policies

As a result of the European Employment Strategy, Member States have intensified their efforts to improve the position of groups and individuals at the margins of the labour market. Active labour market policies are an important instrument in this respect. As defined in Employment in Europe 2006<sup>17</sup>, labour market policies are public interventions targeted towards particular groups in the labour market and, as such, may be distinguished from general employment policies such as measures that lower labour costs. Active labour market policies aim to increase the likelihood of employment or improve income prospects for the unemployed persons/groups who find it difficult to enter the labour market (ibid). Public employment services play an important role in this respect by facilitating the integration of the unemployed and other job seekers in the labour market (e.g. placement, counselling and advice). In addition, active measures include training, job rotation and job sharing, employment incentives, integration of specific groups, direct job creation and start-up incentives<sup>18</sup>.

In order to promote gender equality, equal opportunities principles should be embedded within the operation of the public employment service (PES). An effective method in this respect is the appointment of a specific equal opportunities officer, who has the necessary expertise. Essential seems also that PES employees are informed on the issue of gender mainstreaming and receive training in how to incorporate this in their work. Another important aspect of gender mainstreaming public employment services is that active labour market programmes are open to all inactive persons and not restricted only to benefit claimants and that men and women have equitable access to active labour market policies. This also implies that the specific needs of disadvantaged groups need to be addressed. See box 2 for a checklist on gender mainstreaming active labour market policies.

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<sup>17</sup> European Commission (2006)b, Employment in Europe – 2006, p.120

<sup>18</sup> Ibid.

## Box 2 Gender mainstreaming active labour market policies

### Step 1. Getting organized

- Are there any guidelines or targets set with regard to equal opportunities?
- Are all relevant stakeholders aware of the gender equality issues?
- Is there a clear structure of responsibilities?
- Are training facilities in gender equality issues available and/or is it possible to make use of external expertise?

### Step 2. Learning about gender differences

- Are all relevant statistics differentiated by gender?
- What is the gender division of the target groups?
- What is the gender division of specific disadvantaged groups like school drop out, lone parents, persons on long term leave, long term unemployed, ethnic minorities?
- What are the relevant trends in this respect?

### Step 3. Assessing the policy impact

- Do men and women have equitable access to active labour market policies, including training?
- Are measures available to the inactive as well as the unemployed?
- Are there measures addressing the needs of specific groups, like lone parents (by providing child care services), disabled (by providing social services and technical aid), or women returners after long term care (by offering training facilities)?
- Do active labour market policies promote the entry of women into high quality, non-traditional jobs?
- Do men and women benefit in equal terms from initiatives to start up businesses or any other services provided by Public employment services?

### Step 4. Redesigning policy

- Given the results of step 1, 2 and 3 identify ways in which the policy could be redesigned to promote gender equality. Take into account that gender mainstreaming calls for a more joined up approach, which may involve more than one policy area or department.

## 4.2 Pay and career policies

Gender equality cannot be achieved without both equality in pay and in opportunities but in practice prospects for closing the gender pay gap are also closely intertwined with issues of segregation and continuity of careers. Reducing the gender pay gap is an important topic on the European political agenda. Since 1999 it has been part of the European Employment Strategy and policy efforts have intensified over the years. In 2003 Member States were called on to formulate targets in this respect in order “to achieve by 2010 a substantial reduction in the gender pay gap in each Member State through a multi-faceted approach addressing the underlying factors of the gender pay gap including sectoral and occupational segregation, education and training, job classifications and pay systems, awareness raising and transparency” (Council Decision 2003 L197/20). Eliminating the gender pay gap is also an important objective of the Roadmap for Equality between Women and Men, 2006-2010. The persistence of the gender pay gap, according to the Roadmap, results from direct discrimination against women and structural inequalities, such as segregation in sectors, occupations, and work patterns, access to education and training, biased evaluation and pay systems and stereotypes.

Given the complexity of the causes of the gender pay gap and in line with the suggested multi-faceted approach, the gender mainstreaming pay policies would imply the need for a variety of measures. Firstly, countries may implement an equal pay policy aiming at tackling direct or indirect gender wage discrimination. Examples include (additional) legislation, availability and dissemination of information and initiatives with respect to job evaluation. Relevant in this respect is also the development of an appropriate infrastructure. Secondly, equal opportunities policy may contribute to a reduction of the gender pay gap. Given that an uninterrupted career is still a significant factor in explaining the overall gender pay gap, it is extremely important to enable women to have more continuous employment patterns. Relevant measures in this respect are childcare and leave facilities and measures aimed at desegregation of the labour market, horizontally as well as vertically. As policy with regard to reconciliation is covered by the following policy field, we will in this section concentrate on policies focussing on de-segregating employment patterns. A third line refers to gender mainstreaming ‘general’ wage policies aiming at reducing wage inequality and improving the remuneration of low-paid and/or female-dominated jobs. A complicating factor regarding equal pay issues is that in most countries wage setting is seen as the primary responsibility of social partners. Governments may therefore be rather reluctant to interfere. The above-mentioned expert report therefore also addresses good practices at the level of social partners. See box 3 for a checklist on gender mainstreaming pay and career policies.

## Box 3 Gender mainstreaming pay and career policies

### Step 1. Getting organized

- Are there any guidelines or targets set with regard to equal pay and career policies?
- Are all relevant stakeholders aware of the gender equality issues?
- Is there a clear structure of responsibilities?
- Are training facilities in gender equality issues available and/or is it possible to make use of external expertise?

### Step 2. Learning about gender differences

- Are all relevant statistics differentiated by gender?
- What is the distribution of male and female employees over the wage structure?
- Are women overrepresented among the low paid?
- What are the relevant trends in this respect?

### Step 3. Assessing the policy impact

- Is the equal pay legislation effective at lowering the gender pay gap?
- Is there (additional) legislation that obliges social partners to bargain over equal pay?
- Are companies required to survey and analyse pay practices on a regular basis?
- Are job evaluation measures used on a regular basis?
- Do women returners have access to training?
- Do policies promote (horizontal and vertical) desegregation of occupations and workplaces?
- Are wage policies aimed at reducing wage inequality and improving the remuneration of low-paid and/or female-dominated jobs?

### Step 4. Redesigning policy

- Given the results of step 1, 2 and 3 identify ways in which the policy could be redesigned to promote gender equality. Take into account that gender mainstreaming calls for a more joined up approach, which may involve more than one policy area or department.

### 4.3 Reconciliation policies

In the Roadmap for equality between women and men, the reconciliation of work, private and family life is presented as one of the six priority areas of action for gender equality: “services and structures are adapting too slowly to a situation where both women and men work. Few men take parental leave or work part-time (7.4% compared to 32.6% for women); women remain the main carers of children and other dependants. Men should be encouraged to take up family responsibilities, in particular through incentives to take parental and paternity leaves and to share leave entitlements with women”. Reconciliation policy not only serves to improve gender equality; it is also a necessary condition for the achievement of the EU objectives of growth, employment and social cohesion. In fact, the need to create a flexible economy, using the full potential of the work force, the changing family forms and the demographic pressure from an ageing population have made the reconciliation of work and family one of the major topics on the European social agenda.

Reconciliation policies can be defined as policies that directly support the combination of professional family and private life. As such they may refer to a wide variety of policies ranging from childcare services, leave facilities, flexible working arrangements and other reconciliation policies such as financial allowances for working partners<sup>19</sup>. A gender mainstreaming perspective in the domain of reconciliation is to a certain extent established in so far as most European governments recognise the impact of care responsibilities on women’s employment. Yet countries differ in their policy responses and in their implicit or explicit focus on gender equality. Some countries encourage the supply of public and private services, others improve the opportunities to work part-time hours. Some still consider reconciliation a woman’s affair, whereas others recognise the role of men in care and family responsibilities (mainly encouraging taking up or improving paternity leave schemes). See box 4 for a checklist of gender mainstreaming reconciliation policies.

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<sup>19</sup> Plantenga, J. & C. Remery (2005) *Reconciliation of work and private life. A comparative review of thirty European countries*. European Commission. Luxembourg: Office for Official Publications of the European Communities, p.25

## Box 4 Gender mainstreaming reconciliation policies

### Step 1. Getting organized

- Are there any guidelines or targets set with regard to reconciliation policies?
- Are all relevant stakeholders aware of the gender equality issues?
- Is there a clear structure of responsibilities?
- Are training facilities in gender equality issues available and/or is it possible to make use of external expertise?

### Step 2. Learning about gender differences

- Are all relevant statistics differentiated by gender?
- Are there leave provisions to cope with care of elderly adults?
- What is the take up of leave facilities by gender?
- What is the coverage rate of childcare facilities by age group?
- What are the trends in this respect?

### Step 3. Assessing the policy impact

- What is the impact of leave in terms of labour market behaviour?
- Do leave arrangements for parents promote or discourage attachment to the labour market?
- Do policies promote equal sharing of care responsibilities?
- Is there evidence of commitment to meet childcare coverage targets and to provide affordable, high quality childcare?
- Are opening hours for childcare compatible with full time employment?
- Are there childcare facilities for those engaged in lifelong learning?

### Step 4. Redesigning policy

- Given the results of step 1, 2 and 3 identify ways in which the policy could be redesigned to promote gender equality. Take into account that gender mainstreaming calls for a more joined up approach, which may involve more than one policy area or department.

## 4.4 Flexicurity policies

Flexicurity has become an important frame of reference in the debate about modernizing the European labour markets. The concept of flexicurity gained momentum after the publication in 2003 of the report by the European Employment Task Force, chaired by Wim Kok, on creating more employment in Europe<sup>20</sup>. The report states that in order to boost employment and productivity, Europe needs to increase the adaptability of workers and enterprises. A more responsive organization of work is especially necessary in order to prevent the emergence of a two-tier labour market where 'insiders' benefit from high level of employment protection, while an increasing number of 'outsiders' are recruited under alternative forms of contracts with lower protection. In June 2007, the Commission adopted a Communication on flexicurity which will help reform efforts at the level of the Member States<sup>21</sup>.

It is important to note that flexicurity does not involve entirely new policy measures; rather its novelty lies in the combination of simultaneously introduced measures in the field of both flexibility and security. Wilthagen (rapporteur of the "European Expert Group on Flexicurity") provides the following definition: "A policy strategy that attempts, synchronically and in a deliberate way, to enhance the flexibility of labour markets, the work organization and labour relations on the one hand, and to enhance security – employment security and social security – notably for weaker groups in and outside the labour market on the other"<sup>22</sup>. This definition makes clear that a fully integrated approach to flexicurity goes beyond narrowly defined policies on labour market flexibility and employees security. Also included are active labour market policies, with active job search, job availability, and life long learning as important ingredients. The central focus is on finding a balance of policies with the aim of increasing the adaptability of workers and the work place. As such, the flexicurity approach implies a shift from a job security paradigm (having the same job all your life) to an employment security paradigm (having employment possibilities and abilities all your life)<sup>23</sup>.

Given the relations between flexicurity and gender and the different positions taken within the current debate, a gender mainstreaming flexicurity policies is of utmost importance. In this respect, gender mainstreaming implies the need to recognize the tension between the goal of promoting flexibility and the goal of employment security and the pivotal role of gender in determining the outcomes on the labour market. More in particular a gender mainstream approach to policies in the area of flexicurity<sup>24</sup> :

20 European Commission (2003). *Jobs, Jobs, Jobs. Creating more employment in Europe*. Report of the Employment Taskforce, headed by Wim Kok

21 European Commission (2007), *Towards Common Principles of Flexicurity: More and better jobs through flexibility and security*, SEC(2007) 861

22 Wilthagen, T & F. Tros (2004). The concept of flexicurity: a new approach to regulating employment and labour market. In: *Flexicurity: conceptual issues and political implementation in Europe*. Transfer, *European Review of labour and research*, 10(2).

23 EMCO (2006). *Flexicurity*. EMCO Working Group on flexicurity. May 2006

24 Rubery, J. D. Grimshaw, M. Smith & R. Donnelly (2006). *The National Reform Programmes and the gender aspects of the European Employment Strategy*. The coordinator synthesis report prepared for the Equality Unit, European Commission. University of Manchester, p.214.



- would recognize the role of gender in reinforcing inequalities associated with flexible working and in shaping flexible working patterns;
- address the reconciliation needs of employees with care commitments while recognizing the risks of extending working hours or unsocial hours scheduling;
- supports pathways out of non-standard work and working times to avoid the risks of long term traps and segmentation of women in-to disadvantaged employment forms.

See box 5 for a checklist on gender mainstreaming flexicurity policies.

### **Box 5 Gender mainstreaming flexicurity policies**

#### **Step 1. Getting organized**

- Are there any guidelines or targets set with regard to flexicurity policies?
- Are all relevant stakeholders aware of the gender equality issues?
- Is there a clear structure of responsibilities?
- Are training facilities in gender equality issues available and/or is it possible to make use of external expertise?

#### **Step 2. Learning about gender differences**

- Are all relevant statistics differentiated by gender?
- What is the gender division of typical and a-typical contract?
- What is the gender division of fulltime and part-time working hours?
- What are the trends in this respect?

#### **Step 3. Assessing the policy impact**

- Are flexible time arrangements compatible with women's needs?
- Is the development of flexible working time compatible or incompatible with domestic care responsibilities?
- Are the programmes / policies aimed at men as well as women?
- Do those on flexible contracts have access to training?
- Are there measures to reduce the risk of segregation associated with flexible and part-time working (for example rights to return to full-time work)?
- Are adaptability policies compatible with promoting the closure of the gender gaps (including gender pay gaps)?

#### **Step 4. Redesigning policy**

- Given the results of step 1, 2 and 3 identify ways in which the policy could be redesigned to promote gender equality. Take into account that gender mainstreaming calls for a more joined up approach, which may involve more than one policy area or department.

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# **Manual for gender mainstreaming social inclusion and social protection policies**



# 1. CONTEXT

Equality between women and men became an overarching objective<sup>25</sup> of the Open Method of Coordination for Social Protection and Social Inclusion in March 2006, when the European Council adopted a new framework for the streamlining of the three policy areas of social inclusion, pensions, and health and long-term care through a parallel and forward-looking reporting. This objective raised the prominence of gender equality for the process as a whole, which had previously been promoted separately by the three strands and developed to varying degrees in each.

## Results of the first streamlined reports in 2006

Member States submitted the first round of their National Reports on Strategies for Social Protection and Social Inclusion in the fall of 2006. The Commission's assessment of the gender mainstreaming applied in the 27 reports (EU-25 and Bulgaria and Romania) was, as expressed in the 2007 Joint Report on Social Protection and Social Inclusion<sup>26</sup>, that:

“Overall, Member States are incorporating gender concerns more effectively and data are more often broken down by sex. Some are pioneers in applying gender mainstreaming systematically. But there is still considerable room for ensuring that policy measures are better informed by gender considerations across all three strands of cooperation.”

## Purpose of this manual

Gender equality is a fundamental right, a common value of the EU, and a necessary condition for the achievement of the EU objectives on growth, employment, and social cohesion. In its Roadmap for equality between women and men (2006-2010)<sup>27</sup>, the European Commission underlined the need to achieve equal economic independence for women and men. In particular, the Commission committed itself **to strengthen gender mainstreaming<sup>28</sup> in the Open Method of Coordination for Social Protection and Social Inclusion** and to provide a manual to actors involved in the process. The Portuguese Presidency Conclusions on Indicators in respect of Women and Poverty<sup>29</sup>, adopted in December 2007, also urged the preparation of such manual and called on Member States to use such guidance in preparing their National Reports on Strategies for Social Protection and Social Inclusion and to disseminate it as widely as possible.

25 New Common Objectives from 2006 for the Open Method of Coordination on Social Protection and Social Inclusion: [http://ec.europa.eu/employment\\_social/social\\_inclusion/docs/2006/objectives\\_en.pdf](http://ec.europa.eu/employment_social/social_inclusion/docs/2006/objectives_en.pdf)

26 Joint Report on Social Protection and Social Inclusion 2007: <http://register.consilium.europa.eu/pdf/gr/07/st06/st06694.el07.pdf>

27 Roadmap for equality between women and men. COMM(2006)92 of 1/3/2006: [http://ec.europa.eu/employment\\_social/gender\\_equality/gender\\_mainstreaming/roadmap\\_en.html](http://ec.europa.eu/employment_social/gender_equality/gender_mainstreaming/roadmap_en.html).

28 The commitment to gender mainstreaming has been reinforced by the European Council in March 2006 with the adoption of the **European Pact for Gender Equality**. This Pact underlines the need to contribute fulfilling the EU's ambitions on gender equality as mentioned in the Treaty, to close the gender gaps on employment and social protection, and to contribute to meeting the demographic challenges. The Pact underlines the need to reinforce governance through gender mainstreaming and better monitoring.

29 <http://register.consilium.europa.eu/pdf/en/07/st13/st13947.en07.pdf>

This manual aims to respond to these requests and aspires to be a useful tool for the effective implementation of the principle of equality between women and men in policies on social inclusion and social protection. It describes the gender mainstreaming method in general and provides some practical guidance for each policy strand.

## 2. GENDER MAINSTREAMING: DEFINING THE METHODOLOGY

As expressed in the overarching objectives of the OMC, a goal of social protection systems and social inclusion policies is that they promote equality between women and men. This is a goal that is expressly mentioned in Articles 2 and 3 of the EC Treaty, which underlines the commitment of the European Union to eliminate inequalities and to promote equality between women and men in all its activities.

### Understanding the terminology

The strategy used to achieve this goal is based upon a dual approach: gender mainstreaming and specific actions. *Gender mainstreaming* is the integration of the gender perspective into every stage of the policy process – design, implementation, monitoring and evaluation – with a view to promoting equality between women and men. Gender mainstreaming is not a goal in itself but a means to achieving equality. Similarly, it is not concerned only with women, but with the relationship between women and men for the benefit of both. *Specific actions* may be required in addition to remove those inequalities between women and men which have been identified.

### Applying gender mainstreaming: a four step approach<sup>30</sup>

It should be borne in mind that gender is a structural difference which affects the entire population. Policy decisions which appear gender neutral may have a different impact on women and men, even when such an effect was neither intended nor envisaged.<sup>31</sup>

- The first step to gender mainstreaming is **getting organized**, building awareness and ownership, and establishing a structural and cultural basis for equal opportunities. This includes formulation of objectives and targets, making a plan, drawing up a budget and defining responsibilities and accountability of the different actors involved. Sufficient resources for implementation also need to be made available.

<sup>30</sup> For a more detailed explanation of the four steps of gender mainstreaming, see Manual for gender mainstreaming of employment policies, 2007: [http://ec.europa.eu/employment\\_social/gender\\_equality/docs/2007/manual\\_gender\\_mainstr\\_en.pdf](http://ec.europa.eu/employment_social/gender_equality/docs/2007/manual_gender_mainstr_en.pdf)

<sup>31</sup> A guide to gender impact assessment. Office for Official Publications of the European Communities, 1998. Available at [http://ec.europa.eu/employment\\_social/gender\\_equality/docs/gender/gender\\_en.pdf](http://ec.europa.eu/employment_social/gender_equality/docs/gender/gender_en.pdf).

- The second step is **learning about gender differences**. In order to establish whether the policy at hand is gender relevant, it must be known if it will affect the daily life of part(s) of the population and if there are differences in the situation of women and men in the specific field concerned. The latter requires 1) the availability of statistical information and indicators broken down by sex, and 2) and analysis of this information with a view to identifying gender gaps and trends.
- Once it has been established that the policy is gender relevant, to avoid unintended negative consequences and improve the quality and efficiency of the proposal, the third step, a **gender impact assessment**, should be carried out. This means a comparison and assessment of the current situation and trend with the expected development resulting from the introduction of the proposed policy<sup>32</sup>.

The goal of gender impact assessment is therefore to identify, before a policy is implemented, the potential impact it will have on the respective situation of women and men, in order to ensure that it will contribute to the creation of equality and the elimination of inequalities. Asking a variety of targeted questions to explore the situation of women and men vis-à-vis a given policy is a helpful way to go about assessing possible gender impacts, and the next chapter will provide specific examples in this regard.

- Where the policy is found to have a negative impact on gender equality or to be broadly gender neutral, it is essential to identify ways in which it could be redesigned to promote gender equality<sup>33</sup>. This is the fourth step of gender mainstreaming: **redesigning the policy**, a need for which may be particularly strong where initial gender differences are high. In some cases this may not imply fundamental changes, while in other areas the task may be more complex.

## The role of commitment, ownership, and expertise

Commitment at the top political and administrative level is necessary for the integration of the gender dimension into the policy cycle and for its visible presence in the National Reports on Strategies for Social Protection and Social Inclusion.

Member States are therefore invited to implement gender mainstreaming as part of their tasks and responsibilities from early on in the design of policies. Gender mainstreaming should be part of the basic architecture of a policy and not a last minute amendment. It is not enough to enumerate general principles – the gender mainstreaming strategy should be explicit, specific

32 A guide to gender impact assessment. Office for Official Publications of the European Communities, 1998. Available at [http://ec.europa.eu/employment\\_social/gender\\_equality/docs/gender/gender\\_en.pdf](http://ec.europa.eu/employment_social/gender_equality/docs/gender/gender_en.pdf).

33 Plantenga, J., Remery C. & J. Rubery (2007). Gender mainstreaming of employment policies – A comparative review of thirty European countries, European Commission. Luxembourg: Office for Official Publications of the European Communities: [http://ec.europa.eu/employment\\_social/gender\\_equality/docs/2007/gend\\_mainstr07\\_en.pdf](http://ec.europa.eu/employment_social/gender_equality/docs/2007/gend_mainstr07_en.pdf).  
See also: Manual for gender mainstreaming of employment policies, 2007: [http://ec.europa.eu/employment\\_social/gender\\_equality/docs/2007/manual\\_gend\\_mainstr\\_en.pdf](http://ec.europa.eu/employment_social/gender_equality/docs/2007/manual_gend_mainstr_en.pdf)

and relevant to the policy which is investigated and thoroughly integrated into it<sup>34</sup>. In order to be successful, it is important to build ownership and define who does what in the policy-making team or unit. Where awareness levels are low it may be necessary initially to have one nominated person with specific knowledge and awareness of gender issues<sup>35</sup> to be in charge of giving guidance on how to integrate the gender dimension.

For attaining success, expertise might also be readily available by gender equality units and/or bodies, research institutes, women's organization, or external experts. Cooperation might be helped by the allocation of a specific budget for gender training and gender expert assistance<sup>36</sup>.

## 3. GENDER MAINSTREAMING: SOCIAL INCLUSION AND SOCIAL PROTECTION POLICIES

In order to provide actors with a hands-on tool to gender mainstream social inclusion and social protection policies with a view to promoting equality between women and men, the below section examines broad gender considerations that should be part of the design process when drafting National Strategy Reports on Social Protection and Social Inclusion. The presentation follows the structure of the National Strategy Reports and takes into account the specificities of the three strands.

### 3.1 Common overview

Member States in this section of the report are asked to provide an assessment of the social situation, to present the overall strategic approach they have adopted, and to draw overarching messages.

As the promotion of equality between women and men is an overarching objective, this section ought to provide:

- **an assessment of the statistical indicators regarding gender gaps and inequalities, explicitly referencing sex-disaggregated data where available, such as**
  - What are the gender gaps with regards to employment, unemployment, long-term unemployment, at-risk-of-poverty (also according to age-groups), jobless households, early-school leaving, life expectancy, healthy life years, etc?

34 Gender mainstreaming in the Joint Inclusion Memoranda for future Member States – Practical Guide, 2003: [http://ec.europa.eu/employment\\_social/gender\\_equality/docs/gmprac\\_guide\\_en.pdf](http://ec.europa.eu/employment_social/gender_equality/docs/gmprac_guide_en.pdf).

35 Manual for gender mainstreaming of employment policies, 2007: [http://ec.europa.eu/employment\\_social/gender\\_equality/docs/2007/manual\\_gend\\_mainstr\\_en.pdf](http://ec.europa.eu/employment_social/gender_equality/docs/2007/manual_gend_mainstr_en.pdf)

36 Gender mainstreaming in the Joint Inclusion Memoranda for future Member States – Practical Guide, 2003: [http://ec.europa.eu/employment\\_social/gender\\_equality/docs/gmprac\\_guide\\_en.pdf](http://ec.europa.eu/employment_social/gender_equality/docs/gmprac_guide_en.pdf).

- Can national sources provide information on gender gaps within certain disadvantaged groups, such as the disabled, ethnic minorities or immigrants?
- Is the available information sufficient to assess the social situation for women and men respectively? Is there a need for new indicators and to develop statistics disaggregated by sex in fields where such data are missing?

■ **evidence of gender mainstreaming and gender impact assessment as a tool to promote equality between women and men in the overall strategic approach, such as**

- What measures have been taken/are being taken to promote equality between women and men with regards to social protection and social inclusion policies?

■ **in relation to good governance, explicit mention of institutional mechanisms in place to support gender mainstreaming, such as**

- What national equality body/gender equality unit will be involved in drafting the National Report and how?
- Is there a need to involve/hire expertise? What kind and for which part of the task?
- Are gender equality interests represented in the various committees/groups involved in the drafting of the National Report? This includes NGOs, social partners, national, regional, and local authorities, as well as researchers.

### 3.2 Fighting against poverty and social exclusion

Though gender gaps are decreasing, women in all age groups have higher at-risk-of-poverty rates<sup>37</sup> than men: 16% for those above 18 compared to 14% for men and 21% for those aged above 65 compared with 16% for men<sup>38</sup>. The risk of poverty is especially increased for single mothers and older women, but women members of certain other disadvantaged groups, such as immigrants, ethnic minorities, and the disabled, as well as the long-term unemployed and inactive, or those living in rural areas, may also face more difficulties than men<sup>39</sup>.

Gender mainstreaming has been emphasized as a key requirement in the social inclusion process since its beginning in 2000<sup>40</sup>. This was re-emphasized

37 It is important to interpret figures with caution as they assume an equal distribution of resources within the household, which may not necessarily be the case – the figures in fact may underestimate the problem for women.

38 At-risk-of-poverty rate by age and gender, EU-SILC 2005, common overarching indicator. Figure is for EU-25.

39 For further analysis see: Gender inequalities in the risks of poverty and social exclusion for disadvantaged groups in thirty European countries, 2006, available at: [http://ec.europa.eu/employment\\_social/publications/2006/ke7606201\\_en.pdf](http://ec.europa.eu/employment_social/publications/2006/ke7606201_en.pdf).

Note also the Portuguese Presidency conclusions on Indicators in respect of Women and Poverty, available at: <http://register.consilium.europa.eu/pdf/en/07/st13/st13947.en07.pdf>.

40 See 2000 common objectives: [http://ec.europa.eu/employment\\_social/social\\_inclusion/docs/approb\\_en.pdf](http://ec.europa.eu/employment_social/social_inclusion/docs/approb_en.pdf)



and accorded an even higher profile in the 2002 common objectives<sup>41</sup> which stated the importance of taking the role of gender fully into account in the development, implementation and monitoring of National Action Plans, including in the identification of challenges, the design, implementation and assessment of policies and measures, the selection of indicators and targets and the involvement of stakeholders. This requirement has been repeated in the 2006 guidelines<sup>42</sup> issued to Member States, which also stressed the need to specify how a gender perspective has been taken into account under each priority policy objective, in particular by assessing the implications of the proposed policy measures on the respective situation of women and men.

The assessment of the 2006 round of reporting, as presented in the 2007 Joint Report on Social Protection and Social Inclusion<sup>43</sup>, highlighted the improvements made by Member States in demonstrating more gender awareness with respect to the social situation and social inclusion policies than in previous reports. It has, however, also highlighted that for the bulk of countries there is considerable scope for developing gender mainstreaming consistently across policies, e.g. by allowing available statistical information on gender inequalities to influence policy design more, and for providing more detail on how gender mainstreaming is implemented.

It must be stressed that there are a variety and multifaceted ways in which to tackle gender inequalities in the exposure to poverty and social exclusion. The key challenge is to link gender gaps that are critical to tackle to policy priorities and to ensure that the policy is designed in such a way that it will *de facto* contribute to the elimination of inequalities. **Systematically monitoring and taking into account gender differences in disadvantaged groups are therefore essential for further developing gender mainstreaming in the fight against poverty and exclusion.** The following provides an example in this regard, presenting the rationale of the policy and its possible implications from a gender perspective.

### ...policy example: active inclusion

In order to help Member States mobilise those who can work and provide adequate support to those who cannot, the Commission has proposed a holistic strategy that can be termed active inclusion<sup>44</sup>. It combines income support at a level sufficient for people to have a dignified life with a link to the labour market through job opportunities or vocational training and through better access to enabling services. Active inclusion shapes an “active welfare state” by providing personalized pathways towards employment and ensuring that those who cannot work can live in dignity and contribute as much as possible to society.<sup>45</sup>

41 See 2002 common objectives: [http://ec.europa.eu/employment\\_social/social\\_inclusion/docs/counciltext\\_en.pdf](http://ec.europa.eu/employment_social/social_inclusion/docs/counciltext_en.pdf)

42 The guidelines are available at: [http://ec.europa.eu/employment\\_social/social\\_inclusion/docs/2006/guidelines\\_en.pdf](http://ec.europa.eu/employment_social/social_inclusion/docs/2006/guidelines_en.pdf)

43 Joint Report on Social Protection and Social Inclusion 2007, Supporting Document: [http://ec.europa.eu/employment\\_social/social\\_inclusion/docs/2007/joint\\_report/sec\\_2007\\_329\\_en.pdf](http://ec.europa.eu/employment_social/social_inclusion/docs/2007/joint_report/sec_2007_329_en.pdf)

44 Concerning a consultation on action at EU level to promote the active inclusion of the people furthest from the labour market. COM(2006)44 of 8.2.2006.

45 Modernising social protection for greater social justice and economic cohesion: taking forward active inclusion of people furthest from the labour market. COM(2007) 620 of 17.10.2007.

The policy has a number of implications from a gender perspective that Member States are invited to consider in the design of their policies. As highlighted in the analysis above, the gender disparities in exposure to poverty show higher rates for women than men and do so in a life-cycle perspective. This is partly due to women's greater likelihood for slower, shorter and/or interrupted careers and on average lower earnings than men. Furthermore, the disadvantages faced by women of certain groups, such as immigrant or ethnic minority women<sup>46</sup>, tend to be more accumulated than those for men from the same groups.

Tackling these inequalities requires a multifaceted approach in synergy with the promotion of women's greater labour market participation in the context of the European Strategy for Growth and Jobs, the incorporation of the gender perspective in labour market policies, in particular flexicurity policies, and the continued promotion of reconciliation policies for the benefit of both women and men. Active inclusion policies can make a significant impact not only in promoting the social and labour market integration of the most disadvantaged, but also, by doing so, in reducing gender inequalities.

The followings provide a non-exhaustive sample of questions for Member States to guide them in assessing the gender impact when designing their policies:

#### ■ Minimum income

- What is the composition of the target group for minimum income recipients? Are women or men over-represented?
- Is minimum income designed in such a way as to encourage the avoidance of unemployment and inactivity trap?
- How does minimum income interact with other benefits (e.g. child benefits)?

#### ■ Link to the labour market

- Are the disadvantages faced by women and men considered respectively in access to active labour market policies<sup>47</sup>?
- Are there measures addressing the needs of specific groups, such as lone parents (availability of childcare), women returners (adequately tailored training possibilities,) disabled women, as well as ethnic minority or immigrant women?
- Are the measures available to the inactive as well as to the unemployed?

<sup>46</sup> See the Opinion on the gender dimension of the inclusion of ethnic minorities, adopted in December 2007 by the Advisory Committee on Equal Opportunities for Women and Men: [http://ec.europa.eu/employment\\_social/gender\\_equality/docs/2007/final\\_opinion\\_28\\_11\\_en.pdf](http://ec.europa.eu/employment_social/gender_equality/docs/2007/final_opinion_28_11_en.pdf)

<sup>47</sup> A similar approach on gender mainstreaming active labour market policies can be found in the Manual for Gender Mainstreaming of Employment Policies, 2007: [http://ec.europa.eu/employment\\_social/gender\\_equality/gender\\_mainstreaming/tools\\_en.html](http://ec.europa.eu/employment_social/gender_equality/gender_mainstreaming/tools_en.html)

- Do these policies promote the entry of both women and men into high quality, non-traditional jobs?
- Do men and women benefit in equal terms of initiatives to start up businesses?

#### ■ Access to services

- Do women or men face more difficulties in access to services? If yes, how can they be tackled with a view to eliminating them?
- Are the needs of specific groups facing multiple discrimination, such as ethnic minority and immigrant women, taken into account?
- Are the specific needs of women and men considered, for example, in the way in which vocational training is organized? For example, is childcare offered?
- Do shelters for the homeless and the training of its staff take into account the specific needs of women and men (i.e. single men versus mother with child)?
- Do improvements in the availability and cost profile of public transport, for example, benefit women and men equally (women being more frequent users)?

### 3.3 Modernising pension systems

Pension systems may not always be adapted to the evolving needs<sup>48</sup> of women, who form a majority of elderly people (close to 60% of those aged 65 and almost two-thirds of those aged 75). The general structure of Member States' earnings-related pension schemes mirrors the earnings and employment gaps between women and men on the labour market, reflecting lower opportunities for women to accrue full pension rights and resulting in unsatisfactory pension outcomes for women<sup>49</sup>. The gender difference in the relative income of people aged 65 and older (relative to the age group 0-64) varies from around 2 to 15 p.p. within the Member States, but the current gap in pension entitlements of men and women is on average even larger<sup>50</sup>, leading to a greater at-risk-of-poverty rate for older women compared with men.

The goal of reviewing pension provisions with a view to ensuring the principle of equal treatment between women and men, taking into account obligations under EU law, has been part of the open method of coordination in the field of pensions since the endorsement of the process by the Laeken

48 Joint Report by the Commission and the Council: Adequate and Sustainable Pensions (CS/7165/03, 18/03/2003: [http://ec.europa.eu/employment\\_social/social\\_protection/docs/cs7165\\_03\\_en.pdf](http://ec.europa.eu/employment_social/social_protection/docs/cs7165_03_en.pdf))

49 Adequate and sustainable pensions: synthesis report 2006. SEC(2006)304 of 27/02/2006: [http://ec.europa.eu/employment\\_social/social\\_protection/docs/2006/rapport\\_pensions\\_final\\_en.pdf](http://ec.europa.eu/employment_social/social_protection/docs/2006/rapport_pensions_final_en.pdf).

50 Adequate and sustainable pensions: synthesis report 2006. SEC(2006)304 of 27/02/2006.

European Council in 2001<sup>51</sup>. This goal has been maintained by the new common objectives adopted by the European Council in 2006<sup>52</sup>, which emphasize the need for adequate and sustainable pensions by ensuring that pension systems are well-adapted to the needs and aspirations of women and men, and the requirements of modern societies, demographic ageing and structural change.

All Member States try to correct the insufficient pension accrual of women by promoting their greater participation in the labour market through the European Employment Strategy, as well as by applying specific mechanisms in their pension systems<sup>53</sup>. The latter include the equalization of the retirement age for women and men, the crediting of family care periods, both with regards to children and the elderly, benefits in the case of divorce, as well as survivor's pensions. Other mechanisms, such as minimum guarantee pension schemes, can also have a positive effect in ameliorating the situation of women.

As the assessment of the 2005 round of reporting showed<sup>54</sup>, at least six features should be taken into account when addressing gender inequalities in the earnings-related pension systems of the Member States:

- Career breaks because of maternity and parental leaves or care for disabled and elderly persons
- Part-time work notably because of care obligations
- Gender differences in earnings and career patterns
- Differences in the statutory retirement age
- Dependency on the breadwinner's income in periods of no full-time employment because of family care obligations
- Gender-separated life-tables for the projection of life-expectancy.

While pensions systems may not be the appropriate place to compensate for gender differences in earnings and career patterns, they can, nevertheless, give credits for breaks in paid employment or for part-time work because of care obligations. This practise is increasingly covered by public schemes, however, it is seldom present in second- and third-pillar provisions, whose broader use may increase gender differences in pension entitlements<sup>55</sup>.

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51 Joint report of the Social Protection Committee and the Economic Policy Committee on objectives and working methods in the area of pensions: applying the open method of coordination: [http://ec.europa.eu/employment\\_social/news/2002/jan/laeken\\_en.pdf](http://ec.europa.eu/employment_social/news/2002/jan/laeken_en.pdf)

52 [http://ec.europa.eu/employment\\_social/social\\_inclusion/docs/2006/objectives\\_en.pdf](http://ec.europa.eu/employment_social/social_inclusion/docs/2006/objectives_en.pdf)

53 Adequate and sustainable pensions: synthesis report 2006. SEC(2006)304 of 27/02/2006.

54 Ibid.

55 Ibid.

**In light of population ageing, the application of gender impact assessment in ongoing and future pension reform therefore becomes especially crucial in order to ensure adequate living standards for both women and men during their retirement. The Portuguese Presidency Conclusions on Indicators in respect of Women and Poverty<sup>56</sup>, adopted in December 2007, encouraged Member States in this regard, namely, to analyze the gender impact of their social protection systems, in particular when undergoing reforms, in order to ensure that they are not discriminatory, and that they are well-adapted to the needs and aspirations of women and men.**

The followings provide a non-exhaustive sample of questions for Member States to guide them in assessing the gender impact of their ongoing or future pension reforms. These questions refer to all kind of schemes (except when specification is given):

- Do pension reforms consider the gender gap in the income of older people?
- Can the emphasis on adequacy take better account of care-credits while encouraging sustainability?
- Do pension systems take into account eligibility for benefits after part-time work/atypical employment?
- Do minimum guarantee pensions ensure an adequate standard of living?
- Do survivor's benefits provide for an adequate standard of living?
- Are there specific measures in the case of divorce?
- Does the level at which full contributory years set in public schemes consider the gender dimension?
- Can pension systems accommodate the life expectancy gap between women and men without penalizing either of the sexes? Are annuity calculations gender neutral?
- Are there different pensionable ages for women and men in statutory schemes and are there plans of equalizing it?
- Are there policies of active ageing in place for both of the sexes? Do they provide flexibility for those with caring responsibilities?

<sup>56</sup> <http://register.consilium.europa.eu/pdf/en/07/st13/st13947.en07.pdf>

### 3.4 Improving health and long-term care

Gender inequalities are present in women's and men's health status, as well as access to, use of, and participation in health and long-term care, though gender-sensitive research on the topic is just gaining in prominence.

While women live longer and more (absolute number of) years free of disability, they also spend a higher proportion of their lives in disability (potentially at an older age)<sup>57</sup>. In 2003, for all Member States with available data, men in the EU-15 could expect to live 84.9% of their life without disability, whereas the figure for women was 3.6 p.p. lower at 81.3%. Women are also more likely to engage in health-seeking behaviour and to practise health prevention and promotion, than men<sup>58</sup>. However, older women are more likely than older men to encounter a situation in which they need to rely on some type of long-term care: they predominate in the oldest old age group<sup>59</sup> and self-reported need for long-term care according to age groups shows a greater incidence of dependency and disability when getting older. It is also well-known that women are the main providers of informal care for dependents (children and elderly) and they constitute the largest part of the labour force in the social and health sectors.

In order to better take into account the specific problems of men and women and make their care more effective, the joint objectives for developing care systems, as adopted by the Commission in 2004<sup>60</sup> extending the Open Method of Coordination to the field of health and long-term care, underlined the importance of mainstreaming the gender dimension in the development of prevention and health policies. The objectives also stressed the need for account to be taken of the specific problems that men and women can face especially in human resources policy and the promotion of high-quality jobs.

In accordance with the new common objectives of the OMC relating to this policy strand, Member States are committed to provide accessible, high quality and sustainable health and long-term care.

The 2007 Joint Report on Social Protection and Social Inclusion<sup>61</sup>, however, underlined that while all countries are strongly committed to ensuring access to adequate healthcare and long-term care, this does not necessarily translate into universal access and significant inequities remain. These include lack of insurance coverage, lack of coverage/provision of certain types of care, high individual financial costs of care and geographical

57 Joint Report on Social Protection and social Inclusion 2007. Supporting document. SEC(2007)329 of 6/03/2007.

58 Women's Health in Europe: Facts and Figures Across the European Union. Report prepared by the European Institute of Women's Health in 2006.

59 Life expectancy varies between 75.9 to 83.6 years for women compared to 65.7 to 77.9 years for men. EU-LFS – 2003. Common health and long-term care indicators.

60 Commission Communication on "Modernising social protection for the development of high quality, accessible and sustainable health care and long-term care: support for the national strategies using the open method of coordination"; COM(2004) 304: [http://europa.eu/eur-lex/en/com/cnc/2004/com2004\\_0304en01.pdf](http://europa.eu/eur-lex/en/com/cnc/2004/com2004_0304en01.pdf).

61 Joint Report on Social Protection and Social Inclusion 2007, Supporting Document. SEC(2007)329 of 6/03/2007.

disparities of supply. Furthermore, the 2006 National Reports documented significant differences in the health outcomes within each country between different sections of the population based on socioeconomic status, place of residence and ethnic group (e.g. Roma, travellers or migrants). On average, less advantaged groups have shorter lives, suffer more disease and illness and feel their health to be worse than more advantaged groups.

The Joint Report further underlined the need for measures to increase the retention and supply of medical staff, also for long-term care, and pointed to the need for reconciling family care and paid employment by informal carers.

**Gender impact assessment becomes an important tool in order to unveil the gender dimension of these inequities and challenges, with a view to gender mainstreaming reforms in health and long-term care policies. Indeed, the Council Conclusions on Women and Health from 2006<sup>62</sup> invited Member States to encourage gender mainstreaming in health care.**

A first step in this regard is to gain adequate knowledge about the needs and health status of women and men respectively, and their access to, use of, and participation in health and long-term care. It is only in light of available information, followed by the adaptation of policy to tackle gender inequalities, that health and long-term care systems can better respond to the specific needs of women and men.

The followings provide a non-exhaustive sample of questions for Member States to guide them in assessing the gender impact of their ongoing or future health and long-term care reforms:

- Are there existing or planned initiatives to improve the collection of sex-disaggregated data on women's and men's access to, use of, and participation in health and long-term care?
- Are available sex-disaggregated statistics analyzed with a view to identifying health inequalities between the sexes?
- To what extent and how do health and long-term care systems take into account existing inequalities between women and men?
- Do policies of prevention target women and men better, taking account of their specific needs? Are there specific screening programmes for women/men?
- Are there any specific programmes for pregnant women/new mothers?
- Do women or men in low-income or disadvantaged groups face more difficulties with regards to their access to health and long-term care (women being more exposed to poverty and on average lower earnings than men)? If yes, does the policy design take this into account?

<sup>62</sup> Council Conclusions on Women's Health (2006/C 146/02): [http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/c\\_146/c\\_14620060622en00040005.pdf](http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/c_146/c_14620060622en00040005.pdf)

- Are there any specific measures for ethnic minority and immigrant women?
- Does atypical/part-time work influence insurance coverage?
- Are there initiatives to assess if older women encounter more financial hardship than older men in making use of formal institutional or home long-term care (given their higher exposure to poverty and on average lower income compared with men)?
- Can policies promote the participation of women and men equally into training and life-long programmes for staff in the health and long-term care field?
- Can initiatives be targeted at improving the working conditions and remuneration of staff in the health and long-term care sector in order to attract more people, both young women and men, into the profession?
- Are there initiatives to support informal carers?



European Commission

**Manual for gender mainstreaming employment, social inclusion  
and social protection policies**

Luxembourg: Office for Official Publications of the European Communities

2008 – 38 pp. – 17,6 × 25 cm

ISBN 978-92-79-09266-4

DOI 10.2767/19842



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