



EUROPEAN COMMISSION  
EMPLOYMENT AND SOCIAL AFFAIRS DG

Horizontal and international issues

**Equality for Women and Men**

**Gender Mainstreaming**  
**in the Joint Inclusion Memoranda**  
**for future Member States**

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**Practical Guide**

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- *useful websites*
- *Common Objectives to fight poverty and social exclusion – 2003*

## - outline of the Joint Inclusion Memorandum

This guide offers advice on how to integrate the gender perspective in the Joint Inclusion Memoranda, the JIM. It refers to the common outline which has already been presented to the Candidate Countries by the European Commission to help them draft the memoranda.

The guide is intended to assist those men and women who prepare the memoranda and, in doing so, integrate gender. It draws from experience and good practice at European Union level and in the Member States particularly in the context of preparing National Action Plans against poverty and social exclusion.

## I - PROMOTING EQUALITY BETWEEN MEN AND WOMEN

### ❖ A fundamental task for the European Union

The European Union is committed to eliminate inequalities and to promote equality between men and women in all its activities<sup>1</sup>.

A dual approach is used to achieve this goal which combines :

- gender mainstreaming and
- specific measures targeted at the under-privileged or under-represented sex.

### ❖ Understanding the terminology

**Sex** : the biological differences between women and men

**Gender** : the social differences between women and men that are learned, changeable over time and have wide variations both within and between cultures.

**Gender mainstreaming** is the integration of the gender perspective into every step of policy processes - design, implementation, monitoring and evaluation - with a view to promoting equality between women and men.

Lets be quite clear about gender mainstreaming :

- it is not a goal on its own but it is a means of achieving gender equality
- it is not the sole province of women but it concerns the relationship between men and women in all spheres of society for the benefit of both.

**Gender impact assessment** is the analytical tool for mainstreaming gender into a policy. The set of key questions which shapes it should be adapted to the policy area which is investigated and help to :

- identify the gender gaps and analyse trends in men's and women's situations
- analyse the impact of the policy on men and women in general and in particular groups

Gender impact assessment requires relevant statistics and indicators, disaggregated by sex and highlighting gender gaps.

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<sup>1</sup> Articles 2 and 3 of the Treaty

**Specific measures** : remedial action might be required in addition to gender mainstreaming to remove inequalities between women and men which have been identified.

## ❖ **Cornerstones for successful gender mainstreaming**

### ➤ **Get ministers and top managers on board**

Whatever the political and administrative culture, experience in the European Union shows that the commitment of top level political and administrative management is essential for successful gender mainstreaming.

By signing the Treaty, Candidate countries will endorse, as the current Member States did, the objective of promoting gender equality and the tasks necessary to achieve it.

### ➤ **Start as early as possible**

Gender mainstreaming should be part of the basic architecture of a policy and not a last minute amendment. It should start with its preliminary design. *However, if you have missed it, it is never too late ...*to use opportunities to get involved. Gender mainstreaming is a long term process.

### ➤ **Describe your objective clearly**

When mainstreaming gender in a policy area, it is not enough to enumerate general principles. The gender mainstreaming strategy should be explicit, specific and relevant to the policy area which is investigated and thoroughly anchored into it. Use facts and figures to demonstrate that there are challenges to be tackled. Cf. chapt.2

### ➤ **Cooperate with others and clarify who does what**

Gender mainstreaming is a matter of co-operation with and between all the actors involved in combating poverty and social exclusion: in the fields of employment, social protection, justice, education, health, public finances, economic policy, etc.

The risk with the involvement of so many actors is to dilute responsibilities. It is therefore essential to negotiate clearly goals with them and to empower all partners by sharing the tasks fairly.

Co-operation with the other actors is helped by:

- drafting checklists of questions to be addressed for each policy field
- using specific institutional mechanisms such as:
  - involving specific gender bodies,
  - ensuring balanced representation of both sexes in steering committees,
  - integrating gender officials/experts at the adequate levels in the working process

- allocating a specific budget, seed money for gender training and gender expert assistance

## **II – MAINSTREAMING GENDER IN EACH STEP OF THE MEMORANDUM**

### **❖ The common objectives which frame the memorandum**

The Common Objectives in the fight against poverty and social exclusion frame the Member States' National Action Plans (cf. annex). They are also the framework for preparing the JIM.

In the Common Objectives, Member States take on board the EU task of promoting gender equality and eliminating inequalities. Poverty and social exclusion concern women and men, boys and girls. Integrating an adequate gender perspective in policies to combat poverty and social exclusion contributes to improve their efficiency.

. The Objectives underline the importance of taking into account the gender perspective in :

- "- the identification of challenges,
- the design, implementation and assessment of policies and measures,
- the selection of indicators and targets
- the involvement of stakeholders. "

When ensuring a gender perspective in the JIM it is important to recognise that gender is a structural difference which concerns the entire population. Neither women nor men should be treated as a special vulnerable group. On the contrary gender influences and may reinforce differences and vulnerabilities linked to other factors such as nationalities, class, age, disability, etc.

The following headings correspond to those of the JIM's outline. While there is a specific section of the outline devoted to promoting gender equality, it is important to take it into account when elaborating each section of the JIM. Thus special attention should be given to conducting proper gender impact assessments across the whole process and in each policy field cited by the common objectives.

### **❖ Economic background and social situation**

A comprehensive description of the economic and social situation should contain a gender analysis. Thus these sections should cover the first step of the gender impact assessment, i.e. identify gender gaps and characteristics among low income groups.

- Disaggregate data by sex.
- Cross gender with other factors such as age, employment status, type of households :

Experience from Member States shows that the overall rates of poverty for men and women are often very close<sup>2</sup>. To identify where the gaps are, it is

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<sup>2</sup> This is due in particular to the assumption on equal sharing of income in the household when calculate the poverty rates.

necessary to investigate further the situation of women and men in the low income groups with regard to :

- age,
- type of household (one person household, single parents, etc);
- level of education, school drop-outs, illiteracy ;
- employment status (part-time, short-term contracts), long term unemployment;
- entitlement and access to social protection benefits (minimum income, invalidity, etc);
- access to health care;
- lack of adequate housing, homelessness
- particular risk factors such as disability, immigration and ethnic origin, domestic violence, drug and alcohol addiction, delinquency, , etc

If the existing statistics do not provide you with the required information, please mention it in section 6 of the JIM's outline on statistical systems and indicators.

### ❖ **Key challenges**

The key challenges should relate to the gender gaps and characteristics that have been identified in the previous sections. This means giving priority to addressing significant gender differences in relation to policy domains that are critical to tackling poverty and social exclusion. Special attention should also be given to men and women in particular age groups, household types, etc, who are at greater risk of poverty and social exclusion.

Translating key challenges into policy issues requires to proceed with the second step of the gender impact assessment which is presented below.

### ❖ **Policy issues**

When considering current policies and the priorities for future policy review to prevent and overcome poverty and social exclusion, be aware of the impact these may have on men and women according to their respective life patterns. Policies which appear gender neutral at first sight may, on closer investigation, turn out to affect women and men differently.

The following questions should be addressed for each policy field covered by the Common Objectives :

- How does the policy or measure which is considered affect the daily life of women and men in general or within groups defined by age, disability, etc ?
- Are there significant differences between women and men in relation to this policy or measure in terms of :
  - Rights and access: check existing regulations/rules; do they discriminate directly or indirectly against men or women ?
  - Resources/assets: time, income, education, space, information, access to internet, health, housing, means of transport, ...
  - Participation, representation and decision-making power
  - Social norms which influence gender roles (division of paid and unpaid work, unequal values given to men or women's activities)

Experience in the European Union shows that although men and women have the same rights, there are still cases of indirect discrimination and the sharing of resources, of political and economic power between them display significant differences which can increase poverty and social exclusion.

For example :

- subsidised vocational training organised in the evenings will tend to attract more men than women, if women must stay home to care for their children without affordable caring alternative. In some Member States, caring facilities are organised in tandem with training courses or seminars.
- When funds are invested in leisure activities in disadvantaged areas, don't just go for a football pitch but ask first men and women, boys and girls what they would like.
- Shelters for homeless persons should be organised differently if they are for single unemployed men or single mothers with their children. The type of services and the training of social workers should also be adapted accordingly.

#### ❖ **Promoting gender equality in all action taken to fight poverty and social exclusion**

In this specific section of the JIM's outline it is asked :

- "how gender issues and gender equality are mainstreamed into policies and structures described in the memorandum ?

- what specific measures and structures might be required in complement ? "

Drawing from the analysis from the previous sections, this section should give an overview of the method(s) used for mainstreaming gender in the different policy areas covered by the common objectives, the use of specific action, the institutional mechanisms and the tools which are involved. It would be useful to distinguish what already exists and what needs to be improved or set up to implement the strategy outlined in the JIM.

##### ➤ ***Institutional mechanisms to support gender mainstreaming***

Questions to be addressed :

- What national Equality body(ies) will be involved in drafting the memorandum and how ?
- do you need to involve/hire gender expertise ? What sort of gender expertise do you need and for which part of the task ?
- are gender equality interests represented in the various committees/ groups involved in the drafting of the memorandum? This includes: NGOs, social partners, local, regional and national authorities, researchers

##### ➤ ***Specific action versus gender mainstreaming***

The overall approach of gender mainstreaming might need to be complemented with specific action in favour of the under-represented or

less privileged sex in order to overcome some particular problems. Please explain here where you have taken this option and why.

For example:

- Setting quantitative targets for men or women to achieve a more balanced participation in training;
- Developing specific measures to protect women who are victims of domestic violence and to help them resume a normal life;
- Developing, in addition to legal sanctions against domestic violence, tailor-made measures to rehabilitate the male perpetrators
- Setting a target of at least 40 % of each sex to secure a balanced representation of both sexes in committees.

#### ❖ **Statistical systems and indicators**

Eurostat, the EU statistical Office, develops sex disaggregated statistics in collaboration with the Member States statistical offices. Is it the case of your statistical offices or are there sectors where sex disaggregated data are still missing or are incomplete ? The economic and social situation that you have drawn under sections 1 and 2 should help you to identify the existing gaps to be covered and problems to be solved.

#### ❖ **Support to social inclusion policies through the Structural Funds**

The general Structural Funds Regulation<sup>3</sup> (2000-2006) stipulates that the gender equality dimension must be incorporated into operations cofinanced by the Funds. It endorses the dual approach of gender mainstreaming and specific actions to reduce continuing inequalities. This applies in particular to the **European Social Fund**<sup>4</sup> which is linked to the implementation of the European Employment Strategy and the Social Inclusion Process.

The Technical Paper on Mainstreaming Equal Opportunities in Structural Funds, edited by the European Commission, provides explanations and examples on how to integrate gender equality in Structural Funds operations. Website address in annex 1.

In the JIM, it will therefore be useful to mention how gender is taken into account in the Programming Documents in relation to combating poverty and social exclusion (gender mainstreaming, specific measures, fund allocation if possible).

### **III – FURTHER STEPS TOWARDS NATIONAL ACTION PLANS**

Gender mainstreaming will not end with the finalisation of the JIM but should become a new way of working and planning, a permanent part of the policy-making process. Efforts put into the drafting of the JIM will need to be sustained and developed so as to lay the ground for the National Action Plans on Social Inclusion which are likely to be in 2005.

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<sup>3</sup> Council Reg. (EC) No 1260/1999 of 21 June 1999 laying down general provisions on the Structural Funds

<sup>4</sup> Regulation (EC) No 1784/1999 of the European Parliament and of the Council of 12 July 1999



### ❖ **Develop a bottom-up mobilisation – awareness raising**

A bottom-up approach is essential for successful long term gender mainstreaming. Give time to build up capacity for gender mainstreaming at all levels by appropriate training and debates on practical gender needs and empowerment of women as well as men.

### ❖ **Develop capacity to undertake gender impact assessment**

It is crucial to progressively develop checklists for gender analysis to apply to each specific policy area and country contexts. Examples will be found in the websites reported in annex.

### ❖ **Gender in monitoring and evaluation**

Indicators are key instruments for the monitoring and the evaluation of the European Social Inclusion process. It is therefore essential that gender issues and challenges are adequately reflected in the development of indicators which can be used to assist with the future monitoring of progress of promoting social inclusion.

#### Attached :

1 – Useful websites (Annex I)

2 - Objectives in the fight against poverty and social exclusion - 2003

3 - Outline of the Joint inclusion memoranda – 23 May 2002 - Commission working document –EMPL-E2 " Social protection and inclusion policies"

#### Other useful reading

1 - Council and Commission Joint Report on Social Inclusion 2002 - in particular chapter 4 on promoting equality between men and women

2 - Communication from the Commission on Impact assessment-COM(2002)276 final

## Annex 1 - Useful websites :

### ❖ **European Commission** :

- Gender Equality : [europa.eu.int/comm/employment\\_social/equ\\_opp/index\\_en](http://europa.eu.int/comm/employment_social/equ_opp/index_en).
- Social Inclusion: [europa.eu.int/comm/employment\\_social/soc-prot/soc-incl/index\\_en](http://europa.eu.int/comm/employment_social/soc-prot/soc-incl/index_en).
- Structural Funds:  
[europa.eu.int/comm/regional\\_policy/sources/docoffic/working/doc/mainst\\_en](http://europa.eu.int/comm/regional_policy/sources/docoffic/working/doc/mainst_en).

### ❖ **Member States** :

- Austria: [www.imag-gendermainstreaming.at](http://www.imag-gendermainstreaming.at) ; [www.gendermainstreaming.at](http://www.gendermainstreaming.at)  
[www.gem.or.at](http://www.gem.or.at) (esf-related website)
- Belgium : [meta.fgov.be/pa/paa/framesetfrcf00](http://meta.fgov.be/pa/paa/framesetfrcf00).
- Denmark : [www.lige.dk](http://www.lige.dk)
- Germany : [www.gender-mainstreaming.net/](http://www.gender-mainstreaming.net/)
- Greece : [www.isotita.gr](http://www.isotita.gr)
- Finland : [www.tasa-arvo.fi](http://www.tasa-arvo.fi)
- France : [www.social.gouv.fr/femmes/index](http://www.social.gouv.fr/femmes/index)
- Ireland: [www.equality.ie/](http://www.equality.ie/)
- Italy : [www.palazzochigi.it/cmparita/](http://www.palazzochigi.it/cmparita/)
- The Netherlands : [docs.szw.nl/pdf/35/2002/35\\_2002\\_3\\_2187](http://docs.szw.nl/pdf/35/2002/35_2002_3_2187).
- Portugal : [www.cidm.pt](http://www.cidm.pt)
- Spain : [www.mtas.es/mujer](http://www.mtas.es/mujer)
- Sweden : [www.naring.regeringen.se/fragor/jamstalldhet/](http://www.naring.regeringen.se/fragor/jamstalldhet/)
- United Kingdom : [www.womenandequalityunit.gov.uk](http://www.womenandequalityunit.gov.uk) ; [www.equalityni.org/](http://www.equalityni.org/)