EVALUATION STUDY OF THE INTEGRATION OF THE
GENDER PERSPECTIVE WITHIN STRUCTURAL FUNDS
DURING THE PROGRAMMING PERIOD 2007-2013

EXECUTIVE SUMMARY

Contracting authority: Instituto de Gestão do Fundo Social Europeu, I. P. (IGFSE)

Tenderer: Centro de Estudos Sociais (CES)
Acknowledgements

This study was produced for the IGFSE by the following team:

<table>
<thead>
<tr>
<th>Role</th>
<th>Name(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>General coordinator</td>
<td>Virgínia Ferreira</td>
</tr>
<tr>
<td>Executive coordinator</td>
<td>Rosa Monteiro</td>
</tr>
<tr>
<td>Technical team</td>
<td>Mónica Lopes, Hernâni Veloso Neto, Lina Coelho</td>
</tr>
<tr>
<td>Survey work</td>
<td>Sara Portovedo and José Pedro Arruda</td>
</tr>
</tbody>
</table>

CES – Centro de Estudos Sociais  
Colégio de S. Jerónimo, Apartado 3087  
3000-995 Coimbra  

July 2013  
email: ces@ces.uc.pt  
http://www.ces.uc.pt/  

The text is the sole responsibility of the authors
## CONTENTS

List of abbreviations and Acronyms .......................................................................................... 4

INTRODUCTION .......................................................................................................................... 5

SCOPE, OBJECTIVES AND METHODOLOGY ............................................................................. 6

KEY ASSESSMENT QUESTIONS: MAIN CONCLUSIONS ............................................................... 11

  Question I: Was the approach to gender equality integrated into the programming of the ESF and ERDF programmes? ......................................................................................... 11

  Question II – Is the approach to gender equality being integrated into the implementation, supervision and evaluation processes for ESF and ERDF programmes? 14

  Question III – To what extent have studies and products emerging from the ESF Technical Assistance Programme added value to knowledge and intervention in gender equality? 24

RECOMMENDATIONS .................................................................................................................. 26

BIBLIOGRAPHY ............................................................................................................................ 29
LIST OF ABBREVIATIONS AND ACRONYMS

CIG – Comissão para a Cidadania e Igualdade de Género  
(Commission for Citizenship and Gender Equality)

CITE – Comissão para a Igualdade no Trabalho e no Emprego  
(Commission for Equality in Labour and Employment)

ERDF - European Regional Development Fund

ESF - European Social Fund

IFDR – Instituto Financeiro para o Desenvolvimento Regional  
(Financial Institute for Regional Development)

IGFSE – Instituto de Gestão do Fundo Social Europeu, I. P.  
(Institute for the Management of the European Social Fund)

Intervir+ – Programa Operacional de Valorização do Potencial Económico e Coesão Territorial da Região Autónoma da Madeira  
(Madeira Autonomous Region Economic Potential and Territorial Cohesion Valorisation Operational Programme)

Mais Centro – Programa Operacional Regional do Centro  
(Regional Operational Programme for the 'Centro')

NGOs – Non-governmental organisations

OP(s) – Operational Programme(s)

POAT FSE – Programa Operacional de Assistência Técnica Fundo Social Europeu  
(ESF Technical Assistance Programme)

POEFDS – Programa Operacional Emprego, Formação e Desenvolvimento Social  
(Employment, Training and Social Development Operational Programme)

POFC-COMPETE – Programa Operacional Fatores de Competitividade  
(Thematic Factors of Competitiveness Operational Programme)

POPH – Programa Operacional Potencial Humano  
(Human Potential Operational Programme)

PROCONVERGENCIA – Programa Operacional dos Açores para a Convergência  
(Azores Operational Programme for Convergence)

PRO-EMPREGO – Programa Operacional do FSE para a Região Autónoma dos Açores  
(Azores ESF Operational Programme)

QREN – Quadro de Referência Estratégico Nacional 2007-2013  
(National Strategic Reference Framework 2007-2013)

RUMOS – Programa Operacional de Valorização do Potencial Humano e Coesão Social  
(Madeira Operational Programme for the Value of Human Potential and Social Cohesion)

SIIFSE – Sistema Integrado de Informação do Fundo Social Europeu  
(ESF Integrated Information System)

SF – Structural Fund(s)
INTRODUCTION

1. This document presents the “Evaluation Study of the Integration of the Gender Perspective in Structural Funds during the Programming Period 2007-2013”. Its general outlines are defined by the Terms of Reference agreed with the contracting authority – the Institute for the Management of the European Social Fund (IGFSE – Instituto de Gestão do Fundo Social Europeu, I. P.). In addition to providing a brief characterisation of its matrix of reference, main objectives, methodology and scope, the Executive Summary also contains a summary of the main conclusions and recommendations. The main objective of the study is an analysis of the ways in which the gender perspective has been integrated into the concept, programming, implementation and monitoring of Operational Programmes supported by the European Social Fund (ESF) and the European Regional Development Fund (ERDF). The study included types of measures directly or indirectly associated with the subject of gender equality.

2. The conclusions are the result of analyses of the following: the strategic documents available for each OP; the databases supplied by the IGFSE and IFDR (Financial Institute for Regional Development) containing information on the projects included in the study; studies supported by the ESF TAOP (Technical Assistance Operational Programme); the results of an online survey of beneficiaries; individual interviews held in person or by telephone and focus groups, involving a range of agents; case studies of entities involved in projects.
SCOPE, OBJECTIVES AND METHODOLOGY

3. The Council of Europe and the European Commission have established “gender equality” as “the concept meaning that all human beings are free to develop their personal abilities and make choices without the limitations set by strict gender roles; that the different behaviour, aspirations and needs of women and men are considered, valued and favoured equally” (European Commission, 1998). The gender perspective implies interpelling social reality and the interventions that operate on it, with the aim of identifying the well-being of individuals and their advancement and development in relation to the characteristics, interests and specific features of their condition as women and men.

4. The evaluation study of the integration of the gender equality perspective within ESF and ERDF is structured around two aspects of analysis: the integration of gender mainstreaming and the contribution of specific actions for equality between men and women. It is understood that mainstreaming as a strategy to achieve “gender equality” rather than as an end in itself, must transform social processes and structures in a durable way, leaving an indelible mark on social relations. Equal opportunities and specific actions are indispensable tools in gender mainstreaming, but whereas equal opportunities affect individual rights and specific actions concern the “special needs” of certain groups, mainstreaming operates on meso- and macro-social contexts, seeking to change the sexism embedded in the system and in social structures (Rees, 2005). The differences between the two strategies are centred on three points: the target population, the type of interventions and instruments used and the type of agents. Whilst specific actions consist of temporary responses to problems which affect particular social groups and are promoted by institutional mechanisms designed to combat inequalities between the sexes, mainstreaming actions seek to transform the systems and structures that form the basis of these inequalities to ensure integration of the gender perspective, with a view to promoting equality.
5. In order to pursue a strategy that incorporates the gender perspective at state and organisational level, the following methodologies and tools are required: analytical (statistics broken down by gender; equality indicators; research; diagnostic, evaluation and prospective methodologies; gender analysis; cost-benefit analyses; impact assessment methods; observatories, etc.); educational (techniques to develop awareness and the transfer of knowledge; training; consultancies; handbooks, guides, checklists, brochures and leaflets; educational material for use in schools); participatory (working parties; think tanks; directories; databases; forums that involve both sexes in decision-making; conferences, seminars, public hearings, etc.).

6. The study considers both dimensions in order to produce an evaluation that is both transversal and specific, enabling it to determine, on the one hand, the structural effects of programmes and actions and, on the other hand, the contribution made by these funds to the development of projects and good practices which focus specifically on this strategic area. In adopting this dual analytical view of the subjects being assessed, the study follows the four criteria identified in the European Commission Guide to Gender Impact Assessment (for example, European Commission, 2008), namely: (a) participation; (b) resources; (c) norms and values; (d) rights. It seeks to understand how social intervention sponsored by social funds is effectively promoting equality between women and men in a proactive way, reducing inequalities and supporting both sexes in areas in which their positions are weak.

7. The first specific objective of this study is therefore to assess the extent to which the gender perspective has been integrated into the concept, programming, implementation and evaluation of European structural funds (ESF and ERDF) in Portugal. The second specific objective is to determine the extent to which the actions supported engage in reducing inequalities between women and men, involving an evaluation of the specific priorities for intervention supported by programmes designed to promote gender equality.
In order to achieve these objectives it was necessary to analyse:

i. The design and programming processes;
ii. The way in which gender equality is integrated into programmes;
iii. The results of gender mainstreaming initiatives and specific actions;
iv. Operational Programme monitoring and evaluation systems for gender equality;
v. Studies and products focussing on equality between men and women developed with the support of the ESF Technical Assistance Operational Programme.

8. The definition of the scope of the evaluation was based on the criterion of integration of the gender equality perspective within the different OPs, differentiating between typologies with direct and indirect effects on the promotion of gender equality. Direct effect refers to measures and typologies that explicitly focus on gender equality as a strategic priority, whereas indirect effect involves measures and typologies which do not do this but have relevant repercussions on this level. In the first category, Priority Area 7, typologies 8.7 and 9.7 of the Human Potential Operational Programme (POPH), Axis 1 – Incentives System for Innovation in the POFC-COMPETE Programme and some typologies of the ESF programmes from the Autonomous Regions (PRO-EMPREGO in the Azores and RUMOS in Madeira) may be highlighted. In the second category, the scope of the study extends to other specific typologies in ERDF and ESF OPs.

9. The evaluation covers the concept/design, operationalisation, execution, monitoring and evaluation systems of the ESF and ERDF programmes. In order to analyse the questions included in each of the areas, appropriate evaluation criteria and the respective evaluation indicators were defined. The criteria used for documentary analysis in the study focussed mainly on external coherence with the main public policy instruments for gender equality on a national and European level, and internal coherence between the objectives and their operationalisation. Using the criteria of efficiency, sustainability and innovation, we assessed the way in which gender equality is being integrated into the execution, monitoring and evaluation of projects. The period covered by the analysis began with the
preparation of programmes and extended to the end of 2011, in the midst of the implementation phase.

10. The information supplying the proposed evaluation system was both primary and secondary. The subsystem of secondary information was composed of the document collections for the different programmes, data from the ESF Integrated Information System (SIIFSE) and the IFDR information system, the applicable legislative framework and specialist literature (academic literature, reports, monographs, etc.). The primary information subsystem consisted of:

i) **Individual interviews:**
   a. with agents involved in design and programming and the heads of the managerial, supervisory, monitoring and evaluation bodies of the ESF and ERDF programmes;
   b. The protagonists of gender equality policies.

The 53 interviews yielded information to supplement the interpretation of the documentary data. The dialogues took place in person or by telephone and were based on two previously defined scripts (appended to the Final Report).

ii) **Questionnaire** administered to beneficiaries.

Entities which had developed projects funded by the ESF and ERDF within the scope of the study were invited to respond to a survey. Only 344 responses were validated out of a total of 6,258 entities contacted, meaning that the results of this small sample cannot be extrapolated to the universe as a whole but can only be used to identify trends.

iii) **Case studies.**

The eight case studies that were produced enabled contextual elements to be identified as hypotheses for differentiating between the different projects and their respective developments. Projects were selected based on criteria of diversity in terms of region, type of measure and nature of beneficiary, potentially revealing evidence of good practice with regard to objectives, methodologies and sustainability.
61 people were interviewed individually or collectively, either in person or by telephone, including the managerial and technical staff of beneficiaries and partners, agents involved in interventions and training, and other staff and beneficiaries.

Case studies were produced on the following:

- **Berço de Emprego** (job protection-creation scheme) - PROEMPREGO (ESF)
- **Hospital de Cuidados Continuados de Ílhavo** (Long-Term Care Hospital) - Mais Centro ROP (ERDF)
- **Inovar em Igualdade** (Innovative intervention for gender equality) - POPH (ESF)
- **Projeto Zero e Implementação dos Planos do Município e do Concelho de Oeiras para a Igualdade de Género** (implementation of the Oeiras Municipal Plans for Gender Equality) - POPH (ESF)
- **Vigilância Eletrónica de Agressores and Programa para Agressores de Violência Doméstica** (Electronic Surveillance of Aggressors and the Programme for Aggressors in Domestic Violence) - POPH (ESF)
- **Opção Ave.pt** (Social Intervention Project to promote gender equality) - POPH (ESF)
- **Agir +** (Integrated support programme for female entrepreneurship - POPH (ESF)
- **GAPI 2.0** (Knowledge Valorisation Offices) – POFC-COMPETE (ERDF)

The guide for the case studies and the list of people interviewed in each case can be found in Annex IX, in a separate volume to the Report, entitled “Structural Funds: Good Gender Equality Practices”.

**iv) Focus group interviews** with gender equality specialists and developers of SF financed projects.

Focus group interviews were held with the aim of gathering information that would contribute towards interpreting the conclusions obtained from the study and identify possible areas for future intervention.
KEY ASSESSMENT QUESTIONS: MAIN CONCLUSIONS

Question I: Was the approach to gender equality integrated into the programming of the ESF and ERDF programmes?

11. In general, the analysis revealed that the gender perspective was not integrated into the programming in the same way in the various different programmes. Although the presentation document from the QREN (National Strategic Reference Framework) includes systematic references to including the gender perspective in the socio-economic diagnosis and definition of priorities and objectives for programming, this was not the case in all the national thematic programmes and regional programmes.

12. In the national thematic programmes analysed, only the POPH revealed evidence of the systematic inclusion of the perspective of equality between women and men, clearly demonstrated in the creation of an axis dedicated to prioritising gender equality. The POAT SF does not consider the gender perspective from a systematic point of view. The POFC-COMPETE programme, although not contemplating the transversal incorporation of the gender perspective, considers priorities and relevant support for improving the integration of women in economic life.

13. In the regional OPs (ROPs) efforts to promote employability amongst women and investment in facilities and services to improve the work/family life balance stand out, although this was not their operational focus. These contributions appear to be very standardised, since the ROPs, particularly those financed by ERDF, have a very similar structure, especially in relation to diagnosing situations in terms of gender equality. In other words, a single, national diagnosis is presented, with no reference to specific regional features of gender inequalities and their possible causes.

14. The emphasis placed on gender equality in the design of the ESF OPs for the Autonomous Regions of the Azores and Madeira is differentiated, although both fail to characterise the initial social context adequately with regard to inequalities between the sexes. Whereas PRO-EMPREGO incorporates concrete objectives and
measures for the inclusion of the gender perspective in particular areas of intervention, namely work placement and professional training, the RUMOS programme only states that gender equality is a transversal priority.

15. In the case of the **ERDF OPs in the Autonomous Regions**, both PROCONVERGÊNCIA and INTERVIR+ offer local facilities and services to improve the work-life balance of local populations.

16. It was possible to identify the following **factors which restrict the inclusion of the gender perspective in programme diagnosis and design**: - the marginalisation or disregard for gender equality in relation to other priority areas and its merely “formal” inclusion in order to comply with international commitments; the failure to mobilise people with specific skills in the area of equality; the range of concepts associated with the various types of equality politics and the significance of the impact of gender on the various sector policies.

17. Without a rigorous diagnosis of the inequalities resulting from unjust situations and social segmentation, supported by statistical data by sex and region as in national and international guidelines, the analysis of the impact of gender is rendered invisible. Since it is not possible to provide evidence of the need to support particular measures, these appear disproportionate or even illegitimate.

18. The determination of agents with political responsibilities for promoting the integration of equality between women and men was highlighted in the interviews as one of the decisive factors in successfully integrating the gender perspective into the QREN plan. There was, in fact, a political commitment to gender equality at the highest level, which is indispensable to the mainstreaming strategy, but this commitment did not translate into support and training for agents involved in the programming, management, implementation and evaluation of the actions. The low involvement in the design and programming of SFs of the official equality bodies, the Commission for Citizenship and Gender Equality (CIG – Comissão para a Cidadania e a Igualdade de Género) and the Commission for Equality in Labour and Employment (CITE – Comissão para a Igualdade no Trabalho e no Emprego) is a
clear indication of this. It may also be interpreted as a reflection of the secondary status attributed to them in their task of helping to define policies (Monteiro, 2011).

19. At programming level, gender equality was integrated unevenly on an individual case basis in the various programmes, with the exception of the POPH, where it was pursued more systematically. The potential of the QREN was therefore underrated which, in taking the value of equal opportunities in developing human potential as its main project, had created the conditions for a more systematic and transversal integration of the problematic of gender inequalities. The potential of the learning and tools developed in the previous programming period for promoting gender equality was also undervalued.

20. Even though there is recognition for the quantitative leap forward in terms of financing in the new programming period in comparison with the previous amount, as the European average shows, the proportion of SF, specifically ESF, dedicated to promoting gender equality is relatively low.

21. Analysis of consistency with strategic priorities for gender equality, namely those contained in the Roadmap for Equality between Women and Men (2006-2010), the European Employment Strategy, the III National Plan for Equality, Citizenship and Gender (2007-2010), the III Plan to Combat Domestic Violence and I Plan to Combat Human Trafficking, leads to the conclusion that the various guidelines were only integrated in a relatively consistent way in the case of the POPH. In the other 0Ps only interventions targeting the economic independence of women and the work-life balance were taken into consideration. In general, references to links between national and Community guidelines and priorities are vague and unclear, translating into a lack of content in the planned interventions. Resistance to integrating gender equality into regional and sector programming limits the influence of European political instruments for equality in national programming, a fact that attests to the soft normativity associated with this area of European policy.

22. The situation regarding the use of inclusive language is indicative of the level of coherence in the various design/programming stages, particularly in relation to
specific national regulations. Although it is used systematically in the strategic reference framework (QREN), it only emerges in the POPH, albeit sporadically. It is therefore evident that most of the programmes do not comply with the various Council of Ministers Resolutions (including No. 64/2006) which stipulate that it is obligatory to use "non-discriminatory language" in official documents. In fact, its use declines as the premises become more concrete and are expressed in the practices of agents working in the field.

*Question II – Is the approach to gender equality being integrated into the implementation, supervision and evaluation processes for ESF and ERDF programmes?*

23. In terms of the submission and selection of projects, integration of the gender perspective is visible only in the ESF programmes (in particular the POPH and POAT). The criteria for assessing applications for ERDF OPs show no awareness of gender equality, and this is also the case with the design of the forms, which contain no fields referring to the impact of gender in applications. However, it must be admitted that it is difficult to perceive how actions which appear neutral, such as the construction of a building or the provision of a public service, may produce different opportunities, experiences and benefits for men and women.

24. The inclusion in the design of the forms of a field in which applicants must state whether and how the project will contribute to gender equality is generally viewed as something which would make the developer aware of the problematic from the outset. However, it is also accepted that, in the absence of any specific indicators that would make it possible to assess the degree and quality of the implementation achieved, many entities indicate contributions which the projects do not deliver in practice. Moreover, the repetition of the same justification in dozens of projects indicates that it originates in consultancy firms, meaning that its impact, in terms of creating effective awareness, is limited.

25. Analysis of the content of the answers provided by developers to the open question on the application form concerning the integration of gender equality within the
project enabled two positions to be identified, depending on the interpretation of the need to promote gender equality and the concept of this equality. The first included the entities who deny the existence of inequalities, in some cases explaining this by the fact that the majority of their staff are women. In the second type, four different concepts of gender equality were identified. The first includes gender equality as equal opportunities, to the extent that the proposed activities are open to all, thus ensuring equal access. The second reduces gender equality to its quantitative dimension i.e. to parity. The existence or adoption of strategies that safeguard the presence of the same number of men and women, or a balanced distribution, are presented as a guarantee of effective gender equality. A third concept is based on positive discrimination, either as the supposed means of defining gender equality or as a measure for achieving this. Finally, there is also the view of gender equality as synonymous with gender mainstreaming, expressed in responses that convey the principles and intentions behind making this priority transversal to actual practices and in being proactive in making publics sensitive to, and aware of, the integration of gender equality in all spheres of everyday life. This diversity of representations shows the conceptual and methodological inconsistency that surrounds the subject and the consequent need to invest further in sensitisation and training.

26. Applicants justified their evaluation of a project’s contribution to gender equality on the basis of the thematic priorities in the European Roadmap for Gender Equality (2006-2010) and the gender inequality factors identified in European Commission guidelines. Issues such as equal economic autonomy, gender stereotypes and the work-life balance were cited frequently, in some cases in a sustained way and in others merely as references. It was also noted that the entities favoured training/educational interventions, identifying stereotypes and traditions as the main barriers to achieving effective gender equality. Gender inequalities appear as a strong cultural dimension in which only a change in values, attitudes and behaviour will lead to the emergence of a new paradigm and subsequent new ways of thinking and acting. The need to “change mentalities” emerges repeatedly in discursive practices.
27. During fieldwork, it could be seen that various arguments and frameworks are applied to promoting gender equality when it is necessary to attract attention and mobilise people for project activities. These strategies include gender equality as an integral part of the social responsibility of organisations, a recurring academic strategy in the 2000s. The question of combating gender-based violence and human trafficking has already been framed within the logic of “human rights”. Initiatives to promote a work-family life balance are presented, in turn, as contributing to the “wellbeing of the family” or the “rights of children”, but not as the individual rights of women or men, therefore following the ‘semi-official’ script of European and national employment policies dating from the beginning of this century. Measures to make gender equality transversal to the organisation and management of organisations have also been aided by the official framework given to the so-called “business case” – equality is good for the economy. As some of the interviewees emphasised, the important thing in interventions involving companies and third sector organisations is to show that gender equality is not confused with feminism, since it is clearly separate from a biased concept of feminism, reflected in a reversal of the roles of oppression and domination between women and men or the exclusive benefits of this.

28. The definition, collection and analysis of indicators of execution is one of the ways of monitoring the progress of the implementation of gender mainstreaming and specific activities. Within ESF, in which gender equality is the subject of a significant set of specific measures, the volume of result and achievement indicators that provide a reading of the impact of gender is significant, in particular for the POPH. In ERDF, only a small number of indicators focus on employment created, by gender, and the population covered by support facilities for improving the work-family life balance.

29. The dynamic pursued with regard to mobilising actors to present and develop projects was centred on establishing and publicising application periods, as well as general regional information sessions, which is clearly inadequate in terms of needs in this area. These dynamics do not show evidence of the efforts required to
demonstrate the advantages to potential project developers of including the gender perspective.

30. The developers gave various reasons for submitting applications and developing projects: (i) the need to extend their work capacity by creating new facilities, services and values; (ii) the availability of funding for a particular area of intervention (gender equality) which is not financed by any other type of subsidy or public funding agreement; (iii) the instrumentalisation of this policy area, due to the availability of public funding; (iv) returns in terms of image and branding for the organisation itself (particularly in the case of companies); (v) the opportunity to diagnose needs (high levels of female unemployment cited by female entrepreneurship projects); (vi) the instrumentalisation of existing funding and support (particularly with regard to the extra financial support awarded to projects developed by women). A certain instrumentalisation on the part of a minority of beneficiaries can be detected, which is, nevertheless, legitimate and to be expected, provided that the physical execution conforms to the approved proposal.

31. The various entities were unanimous in citing difficulties in mobilising and involving actors in gender equality awareness and training sessions. They noted, for example, a very significant difference between entities (local authorities or companies) who took the initiative to apply themselves and those who applied on the advice of consultancies. In the case of the former, the conditions for success are facilitated more by the existence of (high-ranking) allies and commitment within the organisation itself. Difficulties were also noted with regard to motivating all the (internal and external) local authority agents involved in developing Equality Plans, made worse by departmentalisation within public administration and the idea that, as public bodies, “they already comply with the law” and ensure equality. Finally, the economic and financial crisis and the impact of austerity measures were singled out as elements that reduce the motivation of agents for becoming involved in promoting gender equality and equal opportunities.

32. There was no record of actions to develop skills within the ESF and ERDF POs for the inclusion of gender equality in the implementation phase. The support offered appears to have been limited to various forms of attendance made available to
entities by the different programmes, and audits (essentially administrative-financial) which some of the heads referred to, inclusively, as “supervisory”.

33. In terms of structures for managing funds, in the view of many of the interviewees, the Commission for Citizenship and Gender Equality (CIG – Comissão para a Cidadania e a Igualdade de Género) and its Technical Secretariat for Equality (STI - Secretariado Técnico para a Igualdade) should have played a decisive role in monitoring the integration of gender equality in programmes and funding, as well as in supporting management structures. In practice, this monitoring took the form of including one representative from the body in the Supervisory Committees for the programmes. The effectiveness of interventions is compromised by the failure to include gender equality and equal opportunities on the agenda for meetings.

34. The monitoring of the execution of projects was criticised, both by the developers and the management structures in terms of the following: a prevailing focus on administrative and financial checks; in part, a lack of efficiency and quality in the monitoring attributable to the imposition of Community regulations that create a lack of continuity between the teams analysing the applications, supervising the technical aspects of the projects and exercising administrative-financial checks; the vagueness of gender equality evaluation in programme projects (with the exception of Axis 7 and typologies 8.7 and 9.7 in the POPH); in some cases, the failure to consider even the breakdown of jobholders by gender to be relevant.

35. With regard to the evaluation of project developers “on-site”, inadequate supervision and support for project development were heavily emphasised, in particular on the part of the STI, namely: lack of support for projects developed as partnerships, thus preventing greater learning and the transfer of good practices; infrequent visits to the “site” for substantive supervision of projects; the type of approach adopted by the STI to “on-site” visits for audits; the bureaucratic workload and the inconsistent information supplied by the STI.

36. More than half of the entities in the survey stated that they had no experience in developing activities related to the problematic (59.1%). This helps to explain the
fact that only 33.1% stated that they had skills in gender equality. This is an obstacle to integrating the gender perspective within the projects and it was therefore concluded that there was a need to strengthen the capacity of entities in this area.

37. The information produced reveals the poor integration of the principle of equality between women and men in the practices of employers involved in projects to promote gender equality. According to their statements, the most common measures before the start of the projects were: the use of inclusive language (54.1% of entities), parity in the composition of groups within the organisation (52%) and the production of job advertisements that did not discriminate in terms of gender (53.2%). The measures most commonly implemented during the course of the projects were the integration of modules on equality within the training offered (24.1% of the entities) and the establishment of partnerships with organisations which promote equality (19.8%). These are therefore measures which, above all, concern information and how it is processed and disseminated.

38. We considered good practices for the integration of the gender equality perspective to be those which showed evidence, in accordance with our criteria, of an innovative, sustainable and transferrable concept. Within the range of good practices found in the case studies, in our view the following offered greater specification and potential for innovation:

- The development of actions guided by a deliberate attempt to counter the effects of reproducing gender stereotypes in social practices and representations and to reinforce the role of men in these activities;
- The structuring of spaces and social values with integrated responses to support families by improving the work-life balance;
- The use of active methodologies involving the target public in the diagnosis and design of activities and their integration within the dynamics of the project, thus contributing towards their empowerment by strengthening social and interpersonal skills (such as the creation of “laboratories”, forum theatre and other arenas for civic participation);
- Networking to ensure sustainability by boosting the synergies of the local associational, economic and institutional fabric, specifically in the context of interventions in the area of domestic violence.
- Reinforcing the capacities of organisations in terms of skills to promote equality between women and men by providing training for managerial and technical staff as well as other cadres;
- The creation of an Equality Officer (companies) or workplace Equality Commission (local administration) to ensure the continuity of actions implemented as part of equality plans;
- The definition of internal references for action (whether or not these are entitled equality plans), with a view to initiating a process of change that makes the organisation and its operations more sympathetic to ensuring a work-life balance and equality for the men and women who work there;
- Making visible successful examples of female entrepreneurship in areas which are highly feminised and traditionally not associated with profit-making economic activity, and providing support for their internationalisation;
- Developing the capacities of strategic agents to intervene in cases of gender-based violence, and a greater institutional focus on aggressors;
- The participatory production of art to help overcome the limitations of verbal expression and initiate a process of intervention involving multiple levels and forms of communication.

39. In the fieldwork, there was, in general, found to be a consensus regarding recognition of the contribution made by the Structural Funds to gender equality, and the consideration that without this there would have been an enormous regression or, at least, stagnation in state policies for equality in the country. Without recourse to Structural Funds to finance what was needed, in a context of austerity the state would not have been able to develop many of its policies designed to develop and spread awareness of gender equality, particularly those aimed at preventing gender-based violence and protecting victims. In fact, it was possible to develop a wide range of projects through three specific typologies whose sole beneficiary was the official equality body - the Commission for
Citizenship and Gender Equality. Some projects, although approved, were not implemented as it was not possible to ensure national contributions.

40. **Axis 7 and measures 8.7 and 9.7 of the POPH (ESF)** provided resources but principally re-signified gender as a national priority, extending the visibility instigated in the previous SF programming period. This area of intervention helped broaden the scope of the work supported by structural funding, operating on the source of the problems, within the employment sphere in terms of **work opportunities** in all sectors and, in terms of gender-based domestic violence, in relation to aggressors. It covered the **context** and the processes which produce inequality, as well as the organisations that work to eradicate it. Interventions in this area involved training for strategic publics, awareness campaigns, plans for equality, and improving/ extending the public network of social support facilities.

41. Other projects were not adequately implemented, as was the case with the gender observatory (Ferreira, coord., et al., 2010). It would have been very important to have had a gender observatory capable of fostering the production, centralisation and availability of information, thus providing visibility for the activities developed by projects supported by Structural Funds and preventing the dispersal that leads to wasted efforts and resources. The Gender Observatory could have constituted an **excellent resource for the efficient implementation of projects and for supporting developers.**

42. More than one third of the entities in the survey stated that the main gain associated with integrating equality between men and women within their projects was a deeper understanding of the outlines of inequality between women and men in the field. In other words, **immaterial gains**, above all, were cited. The predominance of references to gains in know-how is understandable, given that only a limited number of entities had developed projects directly targeting gender equality. From this we may glimpse one of the advantages of this period of Structural Funds programming, namely the introduction of many organisations, specifically companies and local authorities, to gender equality issues.
43. The **difficulties identified by the agents in the survey are diverse**, but all of them seem to point towards difficulties in recognising and implementing the gender mainstreaming strategy. They may be summarised as:

- A lack of gender equality skills on the part of project developers and, in the case of some OPs, their managerial bodies, as well as some companies contracted to provide consultancy and training services;
- A lack of supervision and training/support from agencies qualified in the field of gender equality, to offset the developers’ lack of skills. In particular, it was singled out the non-involvement of the Commission for Equality in Labour and Employment (CITE – Comissão para a Igualdade no Trabalho e no Emprego) in the supervision of actions associated with its area of expertise;
- The enormous bureaucratic-administrative workload, which absorbed a large amount of resources and reduced the capacity of the STI (CIG) to respond, whilst also creating difficulties in managing projects due to an overload of bureaucratic procedures and inconsistencies in the information supplied and the decisions made by managerial bodies;
- Resistance on the part of the public administration, institutions and their agents to the subject of gender equality and a lack of recognition of inequality on the part of target population and society in general;
- The restrictions of this model of financing for civil society which, in implying that the developers have administrative and financial capacities, reduces access opportunities for certain various sectors;
- The impact of the crisis, which contributed towards making equality issues a low priority, both for the developers (particularly companies) and society in general.

44. Despite these difficulties, the information produced enables us to emphasise the **extraordinary importance of Structural Funds for intervention in gender equality**:

- In deploying a dual approach to intervention based on structural measures directed towards institutional norms and practices, and measures that target specific problems and publics;
- In working with individuals (training, supervision and incentives), employers (supporting internal plans for equality) and the socio-economic context (supporting the formation of networks and social facilities);
- In providing resources for creating gender equality that would otherwise not have been available, particularly given the deep crisis affecting the country;
- In opening up the public arena to gender equality by involving thousands of profit and non-profit, central and local, public and private sector organisations in actions focusing on the problematic of gender equality;
- In boosting the capacities of thousands of people and organisations in gender equality know-how, by involving them in training and awareness sessions and through campaigns and various kinds of multimedia content transmitted through the media;
- In making viable awareness of the challenges of creating equality amongst various publics in strategic institutional positions, who can subsequently influence the lives of more women and men;
- In supporting the work of organisations that defend the rights of women, which would have difficulties in obtaining other sources of funding;
- In stimulating argumentative and artistic creativity, developed to raise awareness of inequalities between women and men.

45. The information produced on the management practices of the institutions involved in managing SF and the entities benefitting from this support suggests that the political commitment to gender equality at the highest level, with which the 2007-2013 programming period began, was not reflected throughout the chain of institutions and agents involved in the process of programming, implementing and assessing this funding. In fact, it can be seen that the gender perspective begins to disappear closer to the field. The immaterial gains resulting from work that focuses on processing and disseminating information (awareness and training) are, by nature, individual – passing the responsibility for social change on to their subjects. Without structural change or alterations to the framework of expectations which subjects confront in terms of their performance in the structures and organisations where
they live and work, there is little chance of individual practices alone being able to operate the “desired change”.

**Question III – To what extent have studies and products emerging from the ESF Technical Assistance Programme added value to knowledge and intervention in gender equality?**

46. The focus of the majority of the studies and products is not gender equality, or the concrete situation of men and women. It may be concluded that, with the exception of ten products identified as including issues relating to gender equality, this perspective was absent and had not been made transversal.

- IEPF, *Repositório de recursos formativos dos programas POEFDS e EQUAL* (Bank of training resources for POEFDS and EQUAL programs), 2009.
- Isabel Guerra (Coord), et al., *À Tona de Água 2. Retratos de Um Portugal em Mudança*, (Portraits of a Changing Portugal), 2010.
- Direção-Geral de Inovação e Desenvolvimento Curricular, *Género e recursos educativos digitais* (Gender and digital educational resources), 2012.

47. The ten products in which the problematic in question was identified offered contributions towards improving policies to combat discrimination and inequality in
socio-economic structures, to the extent that they improve our knowledge of these inequalities, their features and impact and of the ways they can be countered. Their contribution to the development and conceptual restructuring of the problematic of gender equality is more circumscribed, since not all the studies include this analytical perspective.
RECOMMENDATIONS

48. A series of recommended actions emerge from the main conclusions of the study which would lead to better integration of the gender perspective and promotion of equality between women and men in the next Structural Funds programming period. Measures supported by the Structural Funds should be structural, focussing on the production of policies, organisations and operations, and should have as their purpose the desegregation of the labour market (attracting men and women to employment sectors and training in areas where they are in a minority), the reduction/elimination of wage differences by re-analysing the classification of occupations, the increased participation of women in economic decision-making, a better work-life balance for both sexes, the promotion of female entrepreneurship and the involvement of women in the management of small and micro enterprises, and the fight against stereotypes and all forms of gender-based violence.

49. In terms of programming, it is considered essential to maintain a dual approach or, in other words, to invest in both transversalisation and specific actions and specifically to: effectively incorporate equality for women and men in all phases of the preparation/design, programming, management, implementation and evaluation of Structural Fund projects; demand proof of compliance with the integration of gender equality in SF financed projects; provide appropriate methodologies and tools to support fieldwork; consider gender equality a criterion for assessing, classifying and approving applications, using checklists and other instruments designed to facilitate this process; to inspire innovative projects for gender equality.

50. In the case of regional development measures (building infrastructures or similar, in particular in ERDF projects), we recommend an explicit analysis of the impact of gender in relation to the planned use of the infrastructures or public services to be created or modernised. It is important to bear in mind the potentially different way in which these may affect the everyday economic, social, political and cultural activities of men and women. The small self-evaluation questionnaire we suggest would avoid the implicit incorporation of any gender bias.
51. In order to ensure the effective implementation and application of the strategy for meeting national and EU objectives for equality between women and men, the following are recommended:

- Create a **system for gathering and analysing indicators by sex** to support rigorous diagnosis and the definition of realistic targets, in conjunction with the Integrated Information and Knowledge System (SIIG) and by adding other indicators to the INE thematic dossier “Gender” (Género);

- Produce **diagnoses of needs which include indicators by sex and region**, in order to identify inequalities affecting men and women, but also the causes of these inequalities;

- Specify the **contribution of programming to gender equality** in accordance with the diagnostics, as well as the operational plan;

- **Define indicators** that contain an assessment of the impact of gender;

- Create **implementation mechanisms/support structures/autonomous infrastructure involving technical staff with gender equality skills** and the knowledge to design, monitor, supervise and evaluate interventions. Include representatives from national gender equality bodies (CIG and CITE) in supervisory and monitoring committees, as well as those from NGOs promoting gender equality or other entities with the appropriate skills profile; create regional networks for gender equality mentoring and counselling (regional units/thematic networks) involving specialists in gender mainstreaming;

- Include elements of the **evaluation of specific actions** to promote gender equality in the **annual reports** on implementation;

- Make it compulsory to establish **strategic partnerships with entities that have know-how and expertise in gender equality** (e.g. universities, research centres, NGOs with relevant experience, official bodies) for the design, implementation and/or evaluation of programmes and projects;

- Promote **compulsory training in gender equality for the heads of the various programmes** to supplement their skills profiles (management, supervisory and technical assistance committees); **e-learning** may be investigated for this purpose.
• Introduce a compulsory **self-evaluation exercise on the integration of gender equality** for people with differing levels of responsibility for applying gender mainstreaming within Structural Funds.

• Provide **project self-evaluation and organisational self-diagnosis tools** that include gender analysis (see the suggestions included in the Study Report).

• Include **gender equality as a criterion for the evaluation, classification and approval of applications**, using checklists and other instruments designed to facilitate this process (see the suggestions in the Study Report).

• **Create a living document** that is updated to ensure that questions emerging from the developers and the best solutions are included, to provide them with support.

• **Intervene in the context** to inspire innovative projects for gender equality.

In general, it is recommended that the governance model for Structural Funds should be improved in terms of the integration of gender equality, particularly with regard to diagnostic methodologies and the definition of action plans and performance of the actors. Motivating, raising awareness and empowering actors are priorities. There is also a great deal of scope for improving the supervision and monitoring of projects and gathering quantitative and qualitative information on interventions that promote gender equality.
BIBLIOGRAPHY


Gerir, Conhecer e Intervir

UNIÃO EUROPEIA
Fundo Social Europeu