



Integrating Equal Opportunities into Objective 2 programmes

IQ-Net Thematic Paper 3(2)

Rona Fitzgerald and Patricia Noble

***IQ-Net
Improving the Quality of Structural Fund
Programming through Exchange of
Experience***

European Policies Research Centre

University of Strathclyde

Graham Hills Building

40 George Street

Glasgow G1 1QE

Tel: +44-141-548 3339/3955

Fax: +44-141-548 4898

E-mail: j.f.bachtler@strath.ac.uk
sandra.taylor@strath.ac.uk

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Preface

IQ-NET: Networking to improve the quality of Objective 2 programmes

Launched in early 1996 and managed by the *European Policies Research Centre* (EPRC) at the University of Strathclyde in Glasgow, the network *IQ-NET* facilitates exchange of experience in the development, implementation and evaluation of Objective 2 programmes. Funded by a consortium of 13 Objective 2 areas and the European Commission (DG XVI), the network meets twice a year to examine issues of practical relevance to programme-makers and share examples of good, innovative and distinctive practice from across the EU. The first three meetings were held in Glasgow, in association with Strathclyde European Partnership (February 1996), in Cardiff, hosted by the Welsh Office and Welsh Development Agency (September 1996), and in Gelsenkirchen, Nordrhein Westfalen, hosted by the Land Government of Nordrhein Westfalen (April 1997). The most recent conference was hosted by the Swedish Objective 2 secretariat in Fyrstad. Meetings provide the opportunity to discuss the results of a structured programme of applied research and debate, steered by the network's partner regions:

- Steiermark and Niederösterreich, Austria
- Nordjylland, Denmark
- Päijät-Häme and South Karelia, Finland
- Aquitaine and Rhône Alpes, France
- Nordrhein Westfalen and Saarland, Germany
- Ångermanlandskusten and Fyrstad, Sweden
- Industrial South Wales and Western Scotland, UK

IQ-NET Thematic Papers

This document contains the third series of thematic papers produced by EPRC in winter 1997 as part of *IQ-NET*'s applied research programme:

- 3.1: The Evolution of Objective 2 Programmes
- 3.2: Integrating Equal Opportunities into Objective 2 Programmes
- 3.3: Meso-Level Partnerships and Structural Fund Implementation
- 3.4: Objective 2 Programming in Fyrstad, Sweden

It supplements the following previous *IQ-NET* papers:

- 1.1: Managing the Structural Funds, Institutionalising Good Practice
- 1.2: RTD/Innovation policies in Objective 2 programmes
- 1.3: Generating Good Projects
- 1.4: Monitoring and Evaluation
- 2.1: Interim Evaluation
- 2.2: Synergy between the ERDF and ESF
- 2.3: The Environment in Objective 2
- 2.4: The Nordrhein Westfalen Objective 2 Programme

Focusing on topics selected by the network's partner regions, each paper places issues in their international context, raises questions for debate and highlights distinctive and innovative practices. For the convenience of readers, executive summaries are included in French, German and English.

Papers are first drafted on the basis of field research (encompassing interviews with Objective 2 programme managers and partners at regional, Member State and Commission levels) and substantial desk research. They are then modified to reflect the discussions of the *IQ-NET*

meeting and the comments of network sponsors. The papers are distributed to a wide group of people nominated by the sponsors. The EPRC welcomes comment and feedback on them.

Readers are reminded that the content of the papers does not necessarily represent the official position of either the partner regions or the Commission, and that errors of fact or interpretation are the responsibility of the authors alone.

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Translations were carried out by Ingrid Schumacher (German) and Lexus in Glasgow (French).

Further Information

Additional copies of the papers and further information on *IQ-NET* can be obtained from John Bachtler and Sandra Taylor, managers of the network, at the EPRC. The December 1996, June 1997 and January 1998 editions of '*IQ-NET Bulletin*', a newsletter co-financed by DG XVI and available from EPRC, contain synopses of the papers.

Integrating Equal Opportunities into Objective 2 Programmes

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Executive Summaries

*Integrating Equal Opportunities into Objective 2
Programmes*

L'Egalité des Chances

Chancengleichheit

1. INTEGRATING EQUAL OPPORTUNITIES INTO OBJECTIVE 2 PROGRAMMES

1.1 Introduction

The involvement of the European Communities in the issue of equal opportunities dates back to the Treaty of Rome in 1957. Since then, the focus has changed from the demand for equal pay for equal work, enshrined in Art. 119, to equal opportunities. In this round of Objective 2 programmes, the EC has placed a high priority on incorporating equal opportunities into regional economic strategies. Targets have been set to raise the participation of women in the labour market and overall to raise the skill and competence levels of the workforce. In setting the agenda for these changes, the EC is particularly concerned to promote good practice in this area. This paper concentrates on the challenge of integrating equal opportunities into broad economic regeneration strategies from the perspective of both the Commission and the regions. It then highlights some issues and questions which can form the basis for discussion and consideration of this complex area of policy.

1.2 Mainstreaming

The concept of *mainstreaming* is central to the Union's policy for equal opportunities. This more global approach to equality calls for the development of a gender perspective and gender analysis of all policies, programmes and actions. 'Mainstreaming' is defined as:

'the systematic consideration of the differences between the conditions, situations and needs of women and men in all Community policies, at the point of planning, implementing and evaluation, as applied to Europe, the industrialised countries and the developing countries'.

The communication on mainstreaming adopted in February 1996, assesses the ways in which equal opportunities have been taken into account to date in EU policies. It also contains suggestions for future action. The communication identifies the important role for the Structural Funds in achieving equal opportunities, underlining the potential of Objective 2 programmes in general, and the ERDF in particular, to promote the contribution of women in regional economic strategies.

1.3 Equal Opportunities in Objective 2 Areas

Commission services underline the various factors that must be considered in the integration of equal opportunities provision into Objective 2 strategies.

- The national context is influential. The position of equal opportunities on the agenda of the different Member States reflects different socio-economic and cultural priorities and institutional structures.
- The complexity of needs in this area means that a clear analysis of the situation in the region is crucial. Survey work carried out by the Commission in a small number of regions underlined the range of different women's needs with regard to participation in the labour market and in

enterprise development. Some require capital and skills investment, and others skills training with support such as childcare, flexible working hours and expert advice. The crucial starting point is the collection and analysis of baseline information which can provide the basis for realistic targets and enable benchmarking of the process of achieving equal opportunities in programmes.

- It is difficult to know exactly how to integrate equal opportunities into Objective 2 strategies. One way would be to focus on measures, while another would be to provide that a proportion of beneficiaries must be women.
- The Action Programmes and Community Initiatives such as URBAN are useful, flexible instruments for targeting women's exclusion. Objective 2 Programmes are much more rigid, but it is important that women are seen as part of regeneration strategies and part of the solution to promoting regional economic development.
- Monitoring and evaluation are an important tool in this process, yet most regions do not have effective systems in place or the requisite methodology for this purpose.

The Commission's approach to overcoming these factors is threefold. The first stage is to gather reliable information about the starting position in the regions and the second to evaluate their needs - a process that is complex and time-consuming. The third stage involves identifying the barriers to integration in the different systems and developing coherent policies and strategies to overcome them. Lastly, there is a need for a system of ongoing monitoring and evaluation at relevant stages. Commission services report that the draft of a tailored methodology for the evaluation of equal opportunity projects and initiatives is being circulated with a view to finalisation in early 1998.

1.4 Regional Experience of Management, Implementation and Evaluation

Research for this round of IQ-NET papers focused primarily on the integration of equal opportunities issues into Objective 2 programmes. The extended paper sets out the experience of the regions, underlining the range of projects being undertaken and identifying distinctive and innovative practice at different stages in the programming process, from strategy development, through to implementation, monitoring and evaluation. Successful integration of equal opportunities strategies in Objective 2 programmes requires active consideration and incorporation at all stages of the process. It is notable that there is a range of experience between and within Member States with regard to how equal opportunities considerations have been integrated into Objective 2 programmes and to what extent. Nonetheless, a number of common issues merit further discussion.

- **Objective 2 as a vehicle for equal opportunities**

The central question relates to the suitability of Objective 2 programmes as a vehicle for the promotion of equal opportunities. Equal opportunity has been a priority for longer in Objective 3 and *NOW*, and it has proved easier to define actions under these programmes. Among the difficulties in Objective 2 programmes is identifying what the Objective 2 programme can do which does not duplicate Objective 3 and *NOW* actions.

- **Regional information**

It is difficult to integrate equal opportunities strategies into regional development programmes without a clear picture of what is happening in the regions. There is an obvious need for comparable data and reliable information. The Commission is working on guidelines for data collection in this area, but the impetus must also come from the regions.

- **Vive la différence**

The differential levels of activity and incorporation must be situated within the different social, economic and cultural contexts. Recommendations and guidelines must take into account these practical differences when designing policy.

- **Co-financing and partnership**

The question of *co-financing and partnership* needs to be addressed. The widespread insistence by many Member States that the membership of partnerships should be drawn from the programme's co-financers militates against the participation of women. The fact that women are not present in a representative and forceful capacity in the partnerships pushes them one step away from programme design and management.

- **Timescales**

The primary focus of programme managers in overseeing the implementation of complex economic development programmes has to be achieving job creation. Complex horizontal priorities such as environmental sustainability and equal opportunities have to compete for time, expertise and resources. The hectic pace of programming periods exacerbates the problem.

- **Good practice and exchange of experience**

Regional actors differ in their response to the provision of more guidelines by the Commission. Concern was expressed that programmes are becoming increasingly rigid and that regional distinctiveness is being eliminated. However, most regional managers underline the need to identify good practice, and to exchange information and experience on all stages of the process from the design of programmes and regional strategies through to the monitoring and evaluation of programmes and projects.

2. L'EGALITE DES CHANCES

2.1 Introduction

L'intervention des Communautés européennes dans la question de l'égalité des chances remonte au Traité de Rome de 1957. Depuis, l'accent est passé de la revendication "à travail égal rémunération égale", maintenant objet de l'article 119, pour se porter sur l'égalité des chances. Dans cette série de programmes d'Objectif 2, la CE a accordé une grande priorité à l'incorporation de l'égalité des chances dans les stratégies économiques régionales. Des objectifs ont été fixés pour accroître la participation des femmes sur le marché du travail et augmenter globalement les niveaux d'aptitude et de compétence de la main-d'œuvre. En déterminant le programme de ces changements, la CE est particulièrement soucieuse de promouvoir une bonne pratique dans ce domaine. Cet exposé se concentre sur le défi que pose l'intégration de l'égalité des chances dans des stratégies larges de régénération économique aussi bien du point de vue de la Commission que des régions. Il souligne ensuite certains problèmes et questions susceptibles d'aider à considérer et discuter de ce domaine complexe de politique.

2.2 Intégration

Le concept d'*intégration* occupe une place centrale dans la politique de l'Union pour l'égalité des chances. Cette approche plus globale de l'égalité exige le développement d'une perspective et d'une analyse prenant en compte l'égalité des sexes, ce pour la totalité des politiques, programmes et actions. L'"intégration" est ainsi définie:

'La prise en compte systématique des différences de conditions, situations et besoins des femmes et des hommes dans toutes les politiques communautaires, au stade de la planification, de la mise en œuvre et de l'évaluation, appliquée à l'Europe, les pays industrialisés et les pays en voie de développement.'

La communication sur l'intégration adoptée en février 1996 évalue les façons selon lesquelles l'égalité des chances a été prise en compte jusqu'à présent dans les politiques de l'UE. Elle contient aussi des suggestions d'action future. La communication reconnaît le rôle important des Fonds Structurels s'agissant de parvenir à l'égalité des chances, soulignant le potentiel des programmes d'Objectif 2 en général et de FEDR en particulier, pour encourager la participation des femmes dans les stratégies économiques régionales.

2.3 L'égalité des chances dans les régions d' Objectif 2

Les services de la Commission soulignent les divers facteurs à prendre en compte pour intégrer les mesures d'égalité des chances dans les stratégies d'objectif 2.

- Le contexte national a une influence. La position de l'égalité des chances parmi les priorités des différents Etats-membres reflète les différentes priorités socio-économiques et culturelles et les structures institutionnelles.
- La complexité des besoins dans ce domaine signifie qu'une analyse claire de la situation dans la région est cruciale. Le travail d'étude effectué par la

Commission dans un petit nombre de régions soulignait la diversité des besoins des femmes relativement à leur participation sur le marché du travail et dans le développement de l'entreprise. Certaines demandent un investissement en capital et dans les compétences, d'autres formation et assistance (garderies/crèches), horaires souples et des conseils d'experts. Le point de départ crucial est la collecte et l'analyse des informations de base susceptibles de fournir la base d'objectifs réalistes et de permettre d'évaluer le processus consistant à réaliser l'égalité des chances dans les programmes.

- Il est difficile de savoir exactement comment intégrer l'égalité des chances dans les stratégies d'Objectif 2. On pourrait se concentrer sur les mesures, ou stipuler que les femmes doivent représenter une certaine proportion des bénéficiaires.
- Les programmes d'action et les initiatives communautaires comme URBAN sont des instruments utiles et souples permettant de cibler l'exclusion des femmes. Les programmes d'Objectif 2 sont nettement plus rigides, mais il est important que les femmes soient considérées comme faisant partie des stratégies de régénération et de la solution favorisant le développement économique régional.
- Le suivi et l'évaluation sont des outils importants dans ce processus, mais la plupart des régions ne possèdent pourtant pour cela ni système efficace, ni méthodologie requise.

La démarche de la Commission pour surmonter ces facteurs est triple. La première étape consiste à rassembler des informations fiables concernant la position initiale dans les régions, et la seconde est d'évaluer leurs besoins, un processus complexe et long. La troisième étape passe par l'identification des obstacles à l'intégration dans les différents systèmes et le développement de politiques et de stratégies cohérentes pour les surmonter. Enfin, un système de suivi et d'évaluation constants aux étapes pertinentes est nécessaire. Les services de la Commission indiquent qu'un projet de méthodologie adaptée à l'évaluation des projets et initiatives d'égalité des chances circule à l'heure actuelle et devrait être finalisé début 1998.

2.4 Expérience régionale de gestion, mise en œuvre et évaluation

Les recherches pour cette série d'exposés IQ-NET ont porté principalement sur l'intégration de l'égalité des chances dans les programmes d'Objectif 2. L'article développé décrit l'expérience des régions, soulignant la diversité de projets entrepris et identifiant des pratiques caractéristiques et innovantes à différents stades du processus de programmation, du développement de la stratégie à la mise en œuvre, le suivi et l'évaluation. Une intégration réussie des stratégies d'égalité des chances dans les programmes d'Objectif 2 exige que soit activement envisagés et incorporés tous les stades du processus. Il faut noter qu'il existe une diversité d'expériences entre les Etats-membres et en leur sein en ce qui concerne la manière dont les considérations d'égalité des chances ont été intégrées dans les programmes d'Objectif 2 et la mesure dans laquelle cela a été fait. Néanmoins, diverses questions communes méritent une discussion plus poussée.

- L'Objectif 2 en tant que véhicule pour l'égalité des chances

La question centrale porte sur l'adéquation des programmes d'Objectif 2 en tant que véhicule pour promouvoir l'égalité des chances. L'égalité des chances est une priorité de plus longue date dans l'Objectif 3 et *NOW*, et il s'est avéré plus facile de définir des actions dans le cadre de ces programmes. Parmi les difficultés rencontrées dans les programmes d'Objectif 2, il faut citer l'identification de ce que le programme d'Objectif 2 peut réaliser sans faire double emploi avec les actions d'Objectif 3 et de *NOW*.

- Informations régionales

Il est difficile d'intégrer les stratégies d'égalité des chances dans les programmes de développement régional sans avoir une idée claire de ce qui se passe dans les régions. Il existe un besoin manifeste de données comparables et d'informations fiables. La Commission travaille à l'élaboration de directives pour la collecte de données dans ce domaine, mais l'élan doit aussi venir des programmes.

- Vive la différence

Les niveaux différentiels d'activité et d'incorporation doivent être replacés dans leurs différents contextes sociaux, économiques et culturels. Des recommandations et des directives doivent tenir compte de ces différences pratiques lors de l'élaboration de la politique.

- Cofinancement et partenariat

Il est nécessaire d'aborder la question du *cofinancement et du partenariat*. L'affirmation fréquente de nombreux Etats-membres que partenariats devraient recruter leurs membres parmi les cofinanceurs du programme va à l'encontre de la participation des femmes. Le fait que les femmes n'aient pas de présence représentative et forte dans les partenariats les éloigne d'un pas de la conception et de la gestion des programmes.

- Délais

Dans la supervision de programmes de développement économique complexes, les chargés de programmes doivent se concentrer principalement sur la création d'emplois. Le temps, l'expertise et les ressources doivent être partagés entre des priorités horizontales complexes, comme le respect de l'environnement et l'égalité des chances. Le rythme effréné des périodes de programmation exacerbe ce problème.

- Bonne pratique et échange d'expérience

Les acteurs régionaux diffèrent dans leurs réactions face aux directives plus nombreuses émanant de la Commission. Certains déplorent la rigidité croissante des programmes et la disparition de leur caractère distinctif régional. Cependant, la plupart des responsables régionaux soulignent la nécessité d'identifier les bonnes pratiques et d'échanger des informations et des expériences concernant tous les stades du processus, de l'élaboration de programmes et de stratégies régionales au suivi et à l'évaluation des programmes et projets.

3. CHANCENGLEICHHEIT

3.1 Einführung

Das Engagement der Europäischen Gemeinschaften an der Frage der Chancengleichheit geht auf den Vertrag von Rom im Jahre 1957 zurück. Seit damals hat sich die Aufmerksamkeit von der in Artikel 119 verankerten Forderung nach gleicher Bezahlung für gleiche Arbeit nun mehr der Gewährleistung gleicher Chancen zugewandt. In dieser Runde der Ziel 2 Programme hat die Europäische Gemeinschaft der Einbeziehung gleicher Chancen in regionale Wirtschaftsstrategien einen hohen Stellenwert zugewiesen. Die gesetzten Ziele sollen die weibliche Teilnahme am Arbeitsmarkt erhöhen und insgesamt Fachkenntnisse und Kompetenzniveau der Arbeiterschaft anheben. Bei der Aufstellung eines Programms für diese Änderungen ist die EG vor allem auf die Förderung guter Praxis in diesem Bereich bedacht. Die vorliegende Arbeit konzentriert sich auf die Herausforderung einer Integration von Chancengleichheit in allgemeine wirtschaftliche Regenerationsstrategien - sowohl aus der Perspektive der Kommission als auch der Regionen. Anschließend beleuchtet sie einige Themen und Fragen, die eventuell die Basis für die Diskussion und Betrachtung dieses komplexen politischen Bereichs bilden können.

3.2 Mainstreaming

Der Begriff *mainstreaming* steht im Mittelpunkt der Chancengleichheitspolitik der Union. Dieser mehr globale Ansatz zu Gleichheit fordert die Entwicklung einer Geschlechtsperspektive und Geschlechtsanalyse aller Maßnahmen, Programme und Aktionen. *Mainstreaming* wird definiert als:

‘die systematische Berücksichtigung der Unterschiede zwischen den Bedingungen, Situationen und Bedürfnissen von Frauen und Männern in der gesamten Gemeinschaftspolitik, zum Zeitpunkt der Planung, Umsetzung und Evaluierung im Hinblick auf Europa, die Industrieländer und die Entwicklungsländer’.

Die im Februar 1996 angenommene Kommunikation zu *Mainstreaming* prüft, inwiefern Chancengleichheit bisher in der EU-Politik berücksichtigt worden ist. Sie enthält auch Vorschläge für zukünftige Aktionen. Die Kommunikation identifiziert die wichtige Rolle der Strukturfonds für die Erreichung gleicher Chancen, unterstreicht das Potential der Ziel 2 Programme im allgemeinen und des EFRE im besonderen für die Förderung des Beitrags von Frauen zu regionalen Wirtschaftsförderungsstrategien.

3.3 Chancengleichheit in Ziel 2 Gebieten

Die Dienststellen der Kommission unterstreichen die verschiedenen Faktoren, die bei der Integration einer Chancengleichheit in Ziel 2 Strategien zu berücksichtigen sind.

- Der nationale Kontext ist einflußreich. Die Position gleicher Chancen auf der Tagesordnung der verschiedenen Mitgliedstaaten reflektiert unterschiedliche sozio-ökonomische und kulturelle Prioritäten und institutionelle Strukturen.

- Die Komplexität der Bedürfnisse auf diesem Gebiet bedeutet, daß eine klare Analyse der jeweiligen regionalen Situation von entscheidender Bedeutung ist. Meinungsumfragen, die von der Kommission in einigen wenigen Regionen durchgeführt wurden, unterstrichen das Spektrum verschiedener weiblicher Bedürfnisse im Hinblick auf eine Teilnahme am Arbeitsmarkt und der Unternehmensentwicklung. Einige erfordern Kapitalanlagen und Investitionen in Fachausbildung, andere Fachausbildung mit zusätzlicher Unterstützung durch Kinderbetreuung, flexible Arbeitsstunden und Expertenberatung. Der entscheidende Ausgangspunkt ist die Sammlung und Analyse grundsätzlicher Informationen, als einer Basis für realistische Ziele und um ein Benchmarking des Prozesses der Erzielung von Chancengleichheit in Programmen zu ermöglichen.
- Es ist schwer, genau zu wissen, wie man Chancengleichheit in Ziel 2 Strategien einbaut. Eine Möglichkeit wäre die Konzentration auf Maßnahmen, eine andere wäre die Regelung, daß ein bestimmter Prozentsatz der Nutznießer Frauen sein müssen.
- Die Aktionsprogramme und Gemeinschaftsinitiativen wie URBAN sind nützliche und flexible Instrumente, um den Ausschluß von Frauen anzugreifen. Ziel 2 Programme sind weit starrer, doch ist es wichtig, daß Frauen als Teil der Regenerationsstrategien und Teil der Lösung zur Förderung regionaler Wirtschaftsentwicklung betrachtet werden.
- Begleitung und Evaluierung sind dabei wichtige Instrumente, doch haben die meisten Regionen keine effektiven Systeme noch die dazu erforderliche Methodologie.

Der Ansatz der Kommission zur Überwindung dieser Faktoren besteht aus drei Phasen. Die erste ist die Zusammenstellung zuverlässiger Informationen über die Ausgangsposition in den Regionen, die zweite betrifft die Auswertung ihrer Bedürfnisse - ein komplexer und zeitraubender Prozeß. Die dritte Phase identifiziert die Hindernisse für eine Integration in den verschiedenen Systemen und die Entwicklung kohärenter Programme und Strategien zu ihrer Überwindung. Schließlich besteht die Notwendigkeit für eine laufende Begleitung und Evaluierung in den relevanten Phasen. Die Dienststellen der Kommission berichten, daß zur Zeit eine maßgeschneiderte Methodologie für die Evaluierung von Projekten und Initiativen der Chancengleichheit im Entwurf ist, die Anfang 1998 fertiggestellt werden soll.

3.4 Regionale Erfahrungen mit Management, Umsetzung und Evaluierung

Die Forschung für diese Runde von IQ-NET Studien konzentrierte sich hauptsächlich auf die Integration von Fragen der Chancengleichheit in Ziel 2 Programmen. Die ausführliche Arbeit führt die Erfahrungen der Regionen auf, unterstreicht den Umfang der unternommenen Projekte und identifiziert auffällige und innovative Praktiken auf verschiedenen Stufen des Programmprozesses, von der Strategieentwicklung bis zu Umsetzung, Begleitung und Evaluierung. Eine erfolgreiche Integration der Chancengleichheitsstrategie in Ziel 2 Programmen erfordert aktive Berücksichtigung und Einbeziehung in allen Verfahrensstufen. Es ist erwähnenswert, daß die Mitgliedstaaten untereinander und intern gewisse

Erfahrungen mit der Integration von Chancengleichheit in Ziel 2 Programmen haben. Nichtsdestoweniger verdient eine Reihe gemeinsamer Fragen weiterer Diskussion:

- Ziel 2 als ein Instrument für Chancengleichheit

Die zentrale Frage bezieht sich auf die Eignung von Ziel 2 Programmen als einem Mittel zur Förderung von Chancengleichheit. In Ziel 3 und *NOW* hat Chancengleichheit schon länger Priorität, und es erwies sich als einfacher, Aktionen nach diesen Programmen zu definieren. Zu den Schwierigkeiten bei Ziel 2 Programmen gehört die Identifizierung dessen, was Ziel 2 Programme tun können, ohne Ziel 3 und *NOW*-Aktionen zu kopieren.

- Regionale Informationen

Strategien der Chancengleichheit lassen sich nur schwer in regionalen Wirtschaftsförderungsprogrammen integrieren, ohne genau zu wissen, was in den Regionen vor sich geht. Offensichtlich sind vergleichbare Daten und zuverlässige Informationen notwendig. Die Kommission arbeitet derzeit an Richtlinien für die Sammlung von Daten in diesem Bereich, doch muß der Anstoß auch von den Programmen kommen.

- Vive la différence

Die verschiedenen Ebenen von Aktivität und Einbeziehung müssen in den jeweiligen sozialen, wirtschaftlichen und kulturellen Kontext passen. Empfehlungen und Richtlinien müssen diese praktischen Unterschiede bei der Planung der Politik berücksichtigen.

- Mitfinanzierung und Partnerschaft

Die Frage einer *Mitfinanzierung und Partnerschaft* muß angesprochen werden. Das weitverbreitete Bestehen vieler Mitgliedstaaten darauf, daß die Mitglieder der Partnerschaften aus den Reihen der Mitfinanzierer des Programms rekrutiert werden sollten, geht gegen die Teilnahme von Frauen. Die Tatsache, daß Frauen keine repräsentative und einflußreiche Kapazität in den Partnerschaften haben, hält sie auf Armeslänge von Programmplanung und Programm-Management.

- Zeitplan

Bei der Begleitung der Umsetzung komplexer Wirtschaftsförderungsprogramme geht es Programm-Managern wohl in erster Linie um die Schaffung von Arbeitsplätzen. Komplexe horizontale Prioritäten wie umweltmäßige Nachhaltigkeit und Chancengleichheit stehen in bezug auf Zeit, Expertise und Ressourcen in Konkurrenz zueinander. Die Hektik der Programmperioden verschärft dieses Problem noch.

- Gute Praxis und Erfahrungsaustausch

Regionale Akteure unterscheiden sich in ihrer Reaktion auf die Bereitstellung von mehr Richtlinien durch die Kommission. Bedenken wurden laut, daß die Programme zunehmend starrer werden und daß regionale Eigenheit ausgemerzt wird. Doch unterstreichen die meisten regionalen Manager die Notwendigkeit, gute Praxis zu identifizieren und

auf allen Verfahrensstufen von der Planung der Programme und regionalen Strategien bis zur Begleitung und Evaluierung von Programmen und Projekten Informationen und Erfahrungen auszutauschen.

Thematic Paper

Integrating Equal Opportunities into Objective 2 Programmes

Integrating Equal Opportunities into Objective 2 Programmes

1. INTRODUCTION

The European Community has placed a high priority on incorporating equal opportunities into regional economic strategies. Targets have been set to raise the participation of women in the labour market and overall to raise the skill and competence levels of the workforce. In setting the agenda for these changes, the EU is particularly concerned to promote good practice in this area. The focus for this round of IQ-Net research is regional practice in terms of planning, implementation and monitoring of equal opportunities strategies. One of the interesting issues to study and compare is the response in the Member States at national and regional level to EU policy and interest in this domain. The following paper is divided into four sections. It begins by tracing the evolution of equal opportunities policy in the European context; it then focuses on the role of equal opportunities in the Structural Funds; next, the challenge of integrating equal opportunities into Objective 2 programmes is outlined, with some examples of integration in practice in the regions; the last section identifies some issues and questions which can form the basis for discussion and consideration of this complex area of policy.

2. POLICY EVOLUTION

EU policy with regard to equal opportunities has evolved incrementally and responded to changes in society and the demands of the women's movement. The Treaty of Rome contains only one article concerning women - Art. 119 - which provides for equal pay for men and women for the same work. Since then through policy instruments such as *Directives*¹ and *Action Programmes* the Union has expanded its objectives for women from equal pay to equal opportunities.

The 1994 Commission White Paper '*European Social Policy - A Way Forward for the Union*', introduced a requirement for Member States to produce an annual report on equal opportunities. The purpose of the Report was to offer a review of developments in achieving equality at both Member State and European level. The Commission intended it for use as an instrument for monitoring equality policies - an essential requirement of mainstreaming. The Member States have been slow to comply with this requirement and the quality of information has not been sufficient to make a comparative analysis of the situation in Member States.

The Commission report *Equal Opportunities for Women and Men in the European Union, 1996*, underlines the Union's commitment to equal opportunities:

¹ Directives are laws which are binding as to the result to be achieved but, the form and method of its application into national law is determined by Member States

“The Equality between women and men is indisputably recognised as a basic principle of democracy and respect for humankind. Since its creation, the Community has recognised the principle of equal pay and, on this basis, has developed a consistent set of legal provisions aimed at guaranteeing equal rights for access to employment, vocational training, working conditions and to a large extent, social protection. In order to promote equality in practice, the Community has implemented specific action programmes since the 1980s, which, though having limited budgetary resources, have had a substantial knock-on effect, particularly by stimulating further action in the individual Member States. Furthermore, the European Council meeting in Essen (December 1994) declared that the promotion of equal opportunities for women and men was a key priority of the European Union and the Member States, on a par with the struggle against unemployment.”

The Commission view was further informed by *The Employment in Europe Report 1996* which presented the trends in employment and the labour market in the European Union. The Report analysed the current situation and outlined a series of policy issues which have to be addressed if the employment problem is to be tackled. Two of the report findings are worth noting:

- Women have accounted for the entire growth of the labour force in the last 20 years, and their activity rate now stands at 70% for the Union as a whole.
- Women are accounting for an increasing proportion of the Union labour force, and for a considerable share of the new jobs being created. While some real progress in equality has been achieved, it remains incomplete. The thrust of policy should remain the mainstreaming of equal opportunities for women and men while recognising the specific needs of women in reconciling work and family responsibilities. Policy action should focus on the removal of labour market segregation of women and the barriers which prevent them from improving their situation on the labour market. Women and men should be encouraged to seek non-conventional career opportunities, thus breaking down occupational segregation.

3. MAINSTREAMING

The concept of *mainstreaming* is central to the Union’s policy for equal opportunities. Mentioned in the Third Action Programme and considerably developed in the Fourth Action Programme, this more global approach to equality calls for the development of a gender perspective and gender analysis of all policies, programmes and actions. ‘Mainstreaming’ is defined as the systematic consideration of the differences between the conditions, situations and needs of women and men in all Community policies, at the point of planning, implementing and evaluation, as applied to Europe, the industrialised countries and the developing countries.

The practice of mainstreaming in Structural Fund programmes would mean that the needs of all potential workers would be considered when a project is

being selected and evaluated. This would require organisations and project sponsors to have an equal opportunities policy and to apply that policy to all projects in a systematic manner. It would mean, for instance, identifying the needs of all potential participants in terms of transport, flexible working time and provision of support such as childcare.

According to the Commission, an application of the mainstreaming principle in, for example, transport policy means that it takes into account the fact that women are much more frequent users of public transport and less frequently own or have access to a car, as compared to men. Women also regularly travel with children and use prams and pushchairs. The development of good, efficient and qualitative public passenger transport systems, which take into account accessibility for passengers with specific needs, would contribute to equal opportunities.

4. AGENDA 2000

In July 1997, the European Commission published its proposals for the development of the Union over the period up to 2006². The document outlined reforms to the Commissions main policy areas, in particular to take account of the implications of enlargement. The document proposes that Community Initiatives be rationalised from 13 to three - one of which is to promote equal opportunities. This accentuates the importance that the Union attaches to the achievement of equal opportunities. It also underlines the success of the CI *NOW* and its capacity to contribute to the achievement of equal opportunities.

5. EUROPEAN LEGISLATION FOR EQUAL OPPORTUNITIES

A series of European Directives concerning equal treatment of men and women have been adopted since 1975, establishing the following rights and principles:

- equal pay for equal work;
- equal treatment in terms of recruitment, training, promotion and working conditions (the directive in question underpins measures banning all sex-based discrimination at work);
- equal treatment in matters of social security;
- equal treatment under occupational social security schemes;
- equal treatment for self-employed women in the various sectors, including agriculture;
- right to paid maternity leave and guarantees concerning health and safety at work (protection of pregnant workers);
- more recently, the June 1996 Council Directive addressed parental leave;

² CEC (1997) *Agenda 2000 - Volume 1 - Communication: For a Stronger and Wider Union*, DOC/97/6 Strasbourg, 15 July 1997

- finally, *COM(97) 202 final, of the 14th. May 1997* - provides an amended proposal for a Council Directive on the burden of proof in cases of discrimination based on sex.

5.1 Fourth Action Programme (1996-2000)

While tackling legislative and regulatory issues through *Directives* and the regulations of the Structural Funds themselves, the Commission has also sought to change attitudes and break down cultural, social barriers to equal opportunities. The instrument for achieving this transformation of perspective is Action Programmes. Guidelines for medium-term action at European level with a view to achieving equal opportunities are set out in a series of specific Action Programmes, the first of which was launched in 1982. With a view to achieving the maximum number of women in employment and upgrading their contribution to economic, social and public life, the **Fourth Community Action Programme** on equal opportunities for men and women seeks to include equal opportunities in all the Community's economic and social policies. The various specific areas of action proposed to tackle unequal pay, women's higher unemployment rate, the increased incidence of poverty among women, violence against women and failure to respect their dignity as human beings, include the promotion of:

- policies aimed at reconciling family and professional life;
- joint action and integrated projects to promote equal opportunities;
- equal opportunities (ending segregation on the employment market, ensuring equal opportunity in the Structural Funds, etc.);
- shared participation by men and women in decision-making processes, and active participation in public life by women.

The proposals include binding legislative instruments concerning child custody and sexual harassment and the strengthening of existing provisions concerning self-employed workers and their spouses.

Partnership is a key element of the Fourth Action Programme. The social partners are specifically mentioned in the objectives of the Programme, which includes a call for the 'equality dimension' to be integrated into the Social Dialogue both at local and regional level, and an undertaking to support efforts by the social partners to develop Europe-wide networking. The Fourth Action Programme also stresses the positive role of social partners as actors in the promotion of women's participation in decision-making.

5.2 Structural Funds and Equal Opportunities

The communication on *mainstreaming*, adopted in February 1996, assesses the ways in which equal opportunities have been taken into account to date in EU policies. It also contains suggestions for future action. An important part of the communication identifies the important role for the Structural Funds in achieving equal opportunities. In particular, it underlines the potential role of Objective 2 programmes in general and the ERDF in particular to promote the role of women in regional economic strategies. The communication further outlines how their resources can be used to help promote equal opportunities.

5.2.1 *European Social Fund*

During the 1989 to 1993 programming period, the ESF was the main Structural Fund to contribute to the promotion of equal opportunities. Women also benefited through its funding of measures to train and help young people and the long-term unemployed. However, the money earmarked specifically to help women was relatively low; only five per cent of ESF appropriations (i.e. ECU 380 million).

While the governing rules of the Structural Funds make explicit reference to the importance of respecting equal opportunities, the ESF actually goes further. Article 1 of the ESF's own Regulation requires the Member States and the European Commission "to ensure that operations under the different objectives respect the principle of equal treatment for men and women". Equal opportunities are referred to in all ESF programming plans. The intention is to take equal opportunities into account as a priority, across the board. The Structural Funds have increased accordingly. Approximately ECU 785 million have been allocated to specific equal opportunity measures which is more than double the money earmarked for the first programming period.

In many Member States, the concern for equal opportunities has led to the creation of a specific priority under Objective 3 (Austria, Belgium, Spain, France, Italy, Luxembourg, Germany, United Kingdom) and the allocation of human resources appropriations under Objective 1 (Ireland, Portugal, Italy, Greece, United Kingdom, Germany). There was no specific mention of an equal opportunity priority in the documents relating to Objective 2 (until the programming period 1997 to 1999) and Objective 5b, and only an indirect one in those relating to Objective 4 (Belgium). Besides specific measures targeted at women, an evaluation of all the measures provided within the programming documents is being carried out by the Commission. The aim of this evaluation is to quantify the effects that the different policy measures have on women.

Specific measures are also being developed to allow women improved access to the labour market by providing assistance with child care and other family responsibilities, and by improving their competitiveness and employability. The latter can be achieved through specific training measures, business start-up aids, and by providing useful information on job vacancies. In some cases, the programme includes measures designed to change the attitudes of parents and women by encouraging them to opt for vocational studies not traditionally pursued by women.

5.2.2 *Co-ordination of Structural Interventions*

One of the important features of this current funding period is that the European Regional Development Fund (ERDF), the ESF and the European Agricultural Guidance and Guarantee Fund (EAGGF) are working together in a more structured manner. For example, in education and training activities; the ESF handles the operating costs while the ERDF is responsible for the purchase of equipment. This co-ordinated approach is particularly effective in the provision of facilities enabling women to combine work and child care. These include crèches, kindergartens, after-school care facilities, and transport to poorly-served, sparsely-populated areas - all vital for women trying to take advantage of training opportunities.

The Structural Funds have also joined up to support measures to help women entrepreneurs or women who work with their husbands in small businesses. Assistance for adapting production, local development or improving quality of life is not just of value to women, but is a powerful indirect means of promoting equality because they make what is locally available so much more attractive and relevant. It is that local feature which is one of the keys to improved employment opportunities for women. According to the Commission, much of the added value within the Community comes in bringing project organisers together. Once the networks have been established, good practice starts to circulate throughout the system.

5.2.3 *NOW: New Opportunities for Women*

One of the specific measures to improve the situation of women in the labour market has been the creation of the Community Initiative **New Opportunities for Women Now**, launched during 1991 in the middle of the 1989-1993 programming period. *NOW* set out to tackle the segregation of the labour market and the growing sense of social exclusion in Europe, both of which have an enormous impact on women. *NOW* carried a budget of ECU 156 million over three years. Out of the 800 projects assisted, 300 were aimed at the creation of small businesses or co-operatives. Other projects set out to raise women's awareness of, and access to, opportunities on the labour market.

When it came to plan for the 1994 to 1999 programming period, DG V looked carefully at the experience with *Now*. In particular, there was a recognition of the need to have more **flexible** eligibility rules. *NOW* also pioneered the concept of 'pathways to integration' whereby packages of personalised measures were developed aimed at reintegration into the labour market. Having proved its worth, *NOW* has ECU 380 million at its disposal for the 1994 to 1999 planning period, well over twice the resources it had previously. The European Commission is responsible for ensuring that equal opportunities are developed as an integral part of all Community Initiatives, and within the mainstream Structural Fund programmes.

6. **THE CHALLENGE OF INTEGRATION IN OBJECTIVE 2**

As outlined in the introduction, EU policy with regard to equal opportunities has evolved incrementally and responded to changes in society and the demands of the women's movement. The Treaty of Rome contains only one article concerning women - Art 119 - which provides for equal pay for men and women for the same work. Since then, through policy instruments such as *Directives* and *Action Programmes*, the Union has expanded its objectives for women from equal pay to equal opportunities. In this current round of Structural Fund interventions the Commission has pushed for what it describes as mainstreaming – the consideration of the needs of both genders. The integration of equal opportunities into Objective 2 programmes represents the realisation of this commitment.

Further, the Commission has clarified what exactly is being aimed for under the Objective 2 programmes for 1997-1999. The definition of equal opportunities under the next programme has been clarified as equality of opportunity between *men* and *women*. Its scope does not extend, for example,

to ensuring equality between ethnic groups or between people of different ages. Furthermore, in pursuing equal opportunities, the Commission has made clear that the aim is not to duplicate activities supported under Objective 3, such as the provision of women-only training courses in male dominated fields. Instead, equal opportunities should be interpreted as more of a horizontal issue in programmes. Efforts to achieve equal opportunities will be focused on “mainstreaming opportunities” i.e. making opportunities genuinely available to the spectrum of the population, for example through appropriate marketing and the provision of “carer support” for those with dependants.

6.1 Equal Opportunities in Objective 2 Regions

The perception of the role of women in industrial economies is linked to a division of labour which sees women as primary homemakers and restricts their role in the labour market to services, teaching and so-called caring professions. Objective 2 areas are former industrial regions where male unemployment is very high. Programme priorities are focused on job creation and there is a question about whether these programmes are a suitable vehicle for the promotion of equal opportunities.

While there may be an opportunity to change this perception in the present technologically based industrial infrastructure the problem is enormously complex. Women are a heterogeneous group with different approaches to the issue of realising equal opportunities and to women’s participation in the labour market. Commission services underline the various factors that must be considered with regard to the integration of equal opportunities provision into Objective 2 strategies.

- The complexity of the needs in this area mean that the starting point is a clear analysis of the situation in the region. There is a need for baseline information which can provide the basis for realistic targets and introduce notions such as benchmarking to the process of achieving equal opportunities in programmes.
- In general, Objective 2 strategies lack the background statistical data, baseline information and the methodology to make the analysis and to interpret progress or lack of it.
- There is a range of economic, social and cultural issues that influence all stages from strategy development through to management, implementation and evaluation of projects to promote equal opportunities.
- It is difficult to know exactly how to integrate equal opportunities into Objective 2 strategies. One way would be to focus on measures while another would be to provide that a proportion of beneficiaries must be women.
- The Action Programmes and Community Initiatives such as URBAN were useful, flexible instruments for targeting women’s exclusion. Objective 2 programmes are much more rigid but it is crucial that women are seen as part of regeneration strategies and part of the solution to promoting regional economic development.

From research in the regions the Commission has identified a range of activities and needs that underline the complexity of the issue. Feedback from the regions indicates that there are varying levels of activity and incorporation. Survey work carried out by the Commission underlined the different needs of women with regard to participation in the labour market and in the development of enterprise. Some need capital and skills investment, others needs skills training with support such as childcare, flexible working hours. With regard to the manner in which business operate some women want to explore possibilities within different legal structures; in some Italian regions they are working as co-operatives. In Finland, some women have indicated that they would prefer loans to venture capital or grants and this facility was introduced in 1997. In other regions such as the West of Scotland the question of micro-funding is being researched to see if it would work in an urban industrial economy.

6.2 Commission Response

6.2.1 Partnership

The existence in member states of socio-economic partnerships which monitor the implementation of the Structural Funds is viewed by the Commission as a positive mechanism to reinforce equal opportunities policy. As the social partners are already working for social and economic development they are well placed to ensure the implementation of equal opportunities in the regions. However, Commissioner Wulf-Mathies has underlined a difficulty with co-financing which relates to the issue of partnership in some Member States. She suggests that the widespread insistence by Member States that the members of these partnerships should be organisations which put money into the programme militates against the participation of women. The fact that women are not present in a representative capacity at all levels of the partnerships pushes them one step away from programme design and management..

6.2.2 Good Practice

In 1997, the Commission carried out a number of studies in Spain, Ireland, Portugal and Finland in order to identify good practice. Following a conference held in Wales in 1996, the Commission supported the production of a publication called *Women players in regional development*. This brochure identified ways in which European Regional Policy can help improve the position of women. The idea behind it was to give examples of good projects as an encouragement to other programme designers and project sponsors. This identification of good projects and exchange of experience is seen as a crucial element in the strategy to integrate equal opportunities into policy-making at all stages.

6.2.3 Guidelines/Toolkit

The Commission is working on a project to provide what it describes as a *toolkit* for regions. This project is developing through stages beginning with the analysis of concepts, identifying and explicating regulations, evaluation of project results and the development of guidelines for programme strategy design and implementation. It is planned to have this *toolkit* available for

regions next September, when it will be released at a seminar on *Mainstreaming Equal Opportunities in Structural Fund Programmes*.

6.2.4 Information and Analysis

Finally, Commission services emphasise the need for a coherent process with regard to the integration of equal opportunities into Objective 2 programmes. The first stage is the gathering of reliable *information* about the position in the regions. The next stage is evaluating the *needs* of the region - a process that is complex and time-consuming. A further stage is identifying the *barriers* to integration in the different systems and the development of coherent policies and *strategies* to overcome them. Lastly, there is a need for ongoing monitoring and evaluation at relevant stages. The Commission is also working on a methodology that would be particularly suited to this composite task.

Table 6.1. Integrating Equal Opportunities Into Objective 2 Programmes

FACTORS	AIMS	STRATEGY
Statistical Data	Accurate gender disaggregated information	Institutionalise collection at project and monitoring stage
Cultural/social attitudes	Change perception of problem as 'women only' and think in holistic way	Integration into regional plans
Different situations needs, expectations and possibilities in the various regions	Understanding of diversity of the problem and identifying barriers	Exchange good practice Clear methodology for evaluation Guidelines for integration

6.2.5 The Practice of Integration

Concerns and issues raised by the Commission are echoed by the regions. Before considering the situation in the regions it is worthwhile briefly situating them in their national context.

The position of equal opportunities on the agenda of the different Member States reflects different socio-economic and cultural structures. The rough schema identified by the Commission reflects in a simplified manner the different regulatory and legal provision at national level. In the Nordic states, national legislation in this area is highly advanced and the integration of equal opportunities policy into all aspects of policy-making is well established. While the results may not be as good as this commitment would imply, the reasons for this are only now being identified in academic literature.

In the Northern European states such as France, Germany and the United Kingdom, the focus of legislation has been on facilitating the full participation of women in the labour market and the tackling of discrimination in this regard. This is not to imply that there is not a broader strategy in these

countries - there is - but the focus of national policy making has been on enabling legislation and ending discrimination.

In some of the southern European countries legislation is concerned with the labour market while policy debate is about reconciling professional and family life. This problem is common to all the Member States. It is the manner in which this it is perceived and addressed that varies. The focus in the southern countries is on facilitating women in this regard while the focus in the Nordic states is on facilitating both men and women at this level.

6.2.6 Response to EU Intervention

An interesting aspect of this issue is the response at national and regional levels to EU policy and interest in this domain. The feedback from the various countries in the consortium was mixed. Some states, notably the Nordics, maintain that national legislation is far ahead of European policy in this area. However, in practical terms, there appear to be the same difficulties in integrating these concerns into Objective 2 programmes. In France, there is concern that the wider socio-cultural situation has more influence on equal opportunities than any European funding programme could have. In addition, most of what can be done through Objective 2 relates to ensuring that the laws regarding equal opportunities are respected - and this is already a matter for the law to pursue.

In the United Kingdom, there is an acceptance of the lead role played by the Community, but a concern that more guidelines and follow-through is required. In Germany and Austria, national legislation is part of the background within which work in this area takes place. However, *Land* level consideration is more important as they are implementing their own policies.

One of the general criticisms is that the Community has not fully thought through the process of integrating equal opportunities in Objective 2 programmes. Commission services underline that there is a great deal of work being done to provide guidelines and support for the next round from 2000-2006. As already discussed in section 4.1, Objective 2 regions are former industrial areas which tend to have persistently high levels of male unemployment. Programme managers are focused on job creation and managing complex programmes for economic development. They perceive that equal opportunities is another burden and question the appropriateness of integration in Objective 2 programmes.

Nonetheless, EU involvement is seen by some regional actors as very positive. They stress that the EU emphasis on equal opportunities provides an important external stimulus and a framework for development. The presence of equal opportunity clauses in EU documentation also adds weight to the importance of the issue and provides an agenda for debate at regional level.

6.3 Regional Experience of Management, Implementation and Evaluation

The research for this round of IQ-Net papers focused primarily on the integration of equal opportunities provision into Objective 2 programmes. This section sets out the experience of the regions, underlining the range of projects being undertaken and identifying distinctive and innovative good practice at

the different stages of the process. The first point to underline is the experiences within the Member States.

6.3.1 *Strategy Development and Data*

In most of the SPDs, the issue of equal opportunities is not central to the economic analysis that underpins the overall strategy. While all contain a commitment to equal opportunities, it often appears as an add-on to comply with regulation rather than as a coherent part of the programme. The regional programmes aspire to integrate equal opportunities but they are not clear as to how this might be achieved. The common problem is the lack of reliable, gender disaggregated information about the labour market in the region or an analysis of how the issue could be addressed. More strikingly, the SPDs demonstrate limited appreciation of the participation of women in local projects or a view about their role as citizens. There is meagre analysis of the actual or potential role for women in regional development.

The following examples illustrate positive approaches to some of the challenges of data analysis and strategy development:

- *Industrial South Wales* The SPD attempts to incorporate equal opportunities throughout the programme by situating the problem within the analysis of the needs of the region. The current SPD 1997-99 makes specific references to equal opportunities. The analysis of the labour market identifies the labour market situation and the need to develop new strategies to provide access for women to training and support across a wide range of areas to facilitate participation. The SPD targets disadvantaged communities and encourages actions to promote equality of opportunity throughout all priorities. These include the participation of all sections of the community in community strategies; support for childcare and other family care to enable carers to return to work and training; actions to promote women managers and entrepreneurs; actions to combat gender stereotyping in training and the labour market. It further provides that wherever possible, SPD targets will be gender disaggregated.
- *Rhône Alpes* A study is being undertaken on the impact and potential of the Structural Funds on equal opportunities in the region. This has taken place because of the particular enthusiasm of the *déléguée régionale aux droits des femmes* - and the support of other regional actors and DATAR.
- *Aquitaine* The *déléguée régionale aux droits des femmes* helped to integrate a description of gender disparity in employment and unemployment into the Aquitaine regional profile. The statistics given comprise: trends in activity rates, unemployment (overall and by eligible area and duration) and qualification levels. The statistics are accompanied by a commentary, and the statement that: 'the specific characteristics of female unemployment should be addressed by actions which address equality of opportunity between men and women and which tailor themselves to the particular employment situation of Bordeaux'.
- *Nordrhein Westfalen*, The labour market section of the regional socio-economic analysis in the SPD contains analysis of the male/female employment and unemployment situations. The analysis explains that the

difference in male/female unemployment ratios between the Objective 2 area and the German average is explained by the fact that it is predominately men who have been affected by the reduction of manufacturing employment. In sectors where females were under-represented, their employment prospects have worsened further, so that they are more than ever over-represented in female-typical tertiary sector jobs. The male/female segmentation of the labour market has therefore become more entrenched.

- *Ångermanlandskusten* In the Swedish region of Ångermanlandskusten, equal opportunity issues are integrated within the description of the regional problem. Although the rate of unemployment is more or less equal in Ångermanlandskusten, the SPD makes reference to the fact that the labour market suffers from certain gender imbalances in that most men work in the industrial sector while most women work in the public sector. In fact, roughly two-thirds of service sector employment is female. The SPD also mentions that the 'poor employment prospects for women make it more difficult for companies to recruit key personnel'. Although there is no mention of how equal opportunities will benefit the programme as a whole, the project selection criteria mentioned above do attempt to make it an element of the conversion strategy.
- *Fyrstad* In Fyrstad, the SPD includes specific targets on equal opportunities, at least in terms of employment, but no separate measures. The programme aims to generate 2,500 jobs in the private sector, at least one-third of which will be for women. The programme also has equal opportunities integrated within project selection criteria: 'priority is given to projects which make a positive contribution to equal opportunities'. Equal opportunities is mentioned as a priority criteria in four out of seven of the measures.

6.3.2 Programme Management

One of the problems in carrying the spirit of equal opportunities through to the implementation stage appears to be the lack of a detailed understanding of what the problems are which need to be addressed. Equal opportunities concerns are not found in specific measures and tend to be promoted in the ESF as part of labour market and human resource measures. Regions report that implementation takes place within the context of the overall programme. As mentioned above, some regions have included equal opportunities consideration as part of the selection criteria with a designated number of points in the scoring system. This can be linked to monitoring and collection of data.

Most of the SPDs do not make reference to special provision of monitoring for equal opportunities. Part of the problem is the lack of targets and specific measures, the lack of data about the current situation and the methodological deficit - the fact that is not a clear methodology for evaluation in this area. Indeed, there are mixed views about how monitoring can be done. In the West of Scotland they decided not to opt for a questionnaire on all projects in contrast to Industrial South Wales which has introduced a questionnaire for all projects which asks the promoters if they have an equal opportunities policy

and also how the rationale for the project has taken into account the specific needs of women, men and other excluded groups. Successful project promoters will then be informed of the need to keep gender disaggregated information.

In the French regions, each programme is establishing its own framework for monitoring equal opportunities aspects of programmes, with the help of its respective *déléguée*, including baselines and indicators. Similarly, in Nordrhein Westfalen, indicators showing the division of male/female jobs exist for certain measures within the Objective 2 programme: investment grants for SMEs, soft loans for SMEs, start-up consultancy, training measures. This data has been used in the interim reports. In other areas, this kind of monitoring is seen as too difficult; it is hard enough to quantify employment effects in general without trying to divide them between the sexes.

The experience of evaluation in most of the regions is similar. There appears to have been very little work done in this regard. Evaluation, and the systematic use of lessons garnered from previous programming periods is an issue that regions are already finding problematic in terms of time and resources. Overall, the regions recognise the need for more and efficient evaluation of programmes. However, this is an area where the regions signalled that they would welcome guidance from the Commission and exchange of experience with other regions. Commission services report that the draft of a note on methodological questions was circulated within the Commission in late 1997 with a view to finalisation in early 1998.

6.4 Case Studies

There is a wide variety of activity in the regions, much of it at the initial stage. While the paper has focused on some of the difficulties in this field, it is also important to point out that a range of innovative and exploratory projects are underway.

6.4.1 Aquitaine: Promoting Recognition of 'Invisible' Employment

The Aquitaine Délégation Régionale de Commerce et de l'Artisanat (DRCA) intends to use Objective 2 support to run information campaigns promoting recognition of the 'invisible' contributions to the economy made by the spouses of those who are self employed, encouraging them to take the necessary steps to have their contribution formally recognised (the provisions already existing in French law). The project was defined in response to the call in Aquitaine for each of the deconcentrated agencies of the state to consider how the new emphasis on equal opportunities in the Objective 2 programme could be actualised through their work.

In brief, the issue for the DRCA was that while there are 50,000 spouses of entrepreneurs bringing a significant practical contribution to the family business in Aquitaine (95 percent of them women), the work of only c.1000 of them is actually formally recognised, even though there are three possible legal arrangements for this to happen (through the status of '*conjoint collaborateur*', '*conjoint associé*' and '*conjoint salarié*'). This is a serious weakness in regional small businesses. With no official legal status in the firm, these spouses have no legal rights for maternity pay, sickness pay,

pensions and other social security provisions. In addition, their situation is legally ambiguous and thus precarious should the entrepreneur proper be taken ill or die, or should they divorce.

Information campaigns are needed to encourage relevant individuals to take up the provisions already offered in law, and the DRCA decided that these could be undertaken in the context of the Objective 2 programme. A target of 8 information initiatives has been set. The DRCA will implement the initiative through Measure 1.3 - new service activities - commerce and crafts. In so doing, they will co-operate with the *déléguee régionale aux droits des femmes* and with the various business chambers existing in the region. Because the initiative is just starting, there is no implementation best practice yet.

6.4.2 *Lower Austria: New Firm Start-Up Programme for Women*

Lower Austria has set up a small women's unit within the *Land* government. It has the task of generating initiatives in the region which support and promote women and equal opportunities issues. One task identified is the need to create an entrepreneurial climate for women in Lower Austria. Overall, Austria is ranked second-last in the EU in terms of its new firm start up rate, and only a third of all self-employed people are women. At the start of the project, a new firm start up study was carried out in conjunction with the AMS (also co-funded by the EU). On this basis, a pilot project was developed in 1997 and is offered in the Objective 2 areas of Berndorf, Neunkirchen and Wiener Neustadt. The target group is unemployed women with a business idea. They are offered assistance to develop the concept and start their business and then to ensure the successful early months of the new venture. The assistance starts with an "Entrepreneur Day" where basic information on starting to develop a business concept is offered. This is followed by a three day workshop, which provides more thematic insight into running a business. Individual consultancy tailored to the particular situation of the entrepreneur is also offered. Finally, the entrepreneur receives coaching in the first few months to help with teething problems. An important effect of this project which supports individual initiative is the reduction in unemployment through the creation of new jobs.

6.4.3 *Ångermanlandskusten: SMASS Project*

SMASS is an abbreviation for 'smaforetagsassistenten' (i.e. assistance for small companies). SMASS is a project in Ångermanlandskusten's Objective 2 programme. The project was launched by the CAB in January 1995 and it ended two years later, in December 1996. The objective of the project was to provide a number of SMEs with administrative assistance and help with improving their all-round skills. It was hoped that this would contribute to raising the level of administrative competence in these companies and allow more resources to help their managerial functions. Unemployed women who were formerly employed in the public sector were placed in SMEs and were the main beneficiaries of the project.

The project had three phases. In phase one, a pilot study was undertaken to reveal the skills problems in local small businesses. This revealed that small business often encountered difficulties when recruiting qualified personnel and that many were keen to hire administrative staff. Phase two attempted to

match the needs of some selected companies with the skills of unemployed people who were seeking re-employment. Finally, in phase three, 14 people were selected and trained by a consultancy firm and by AMU (a public educational company) and then placed in 13 different companies. The training used in the project included: business economics, computing, personnel development and speech and presentation training.

Of the 14 people placed with local companies, half were women. One of the purposes of the SMASS project was to enable trainees to obtain full-time employment once the project had terminated. The result so far is that 8 people got permanent employment in placement companies, five of whom were women. Therefore, 64 percent of the unemployed people participating in the project have acquired some kind of employment. The project is also deemed successful in other ways. First, the recruiting companies have increased their administrative competence levels. Second, the managers of these companies have hopefully been able to reduce their administrative workload, thus enabling to spend more time with their families and developing their business. Finally, the project was successful in generating new opportunities for older people. The average age of participants was 42 and four of the people who obtained employment were over 50.

Given this, the project is regarded as a highly effective way of reducing female unemployment, especially amongst those who normally experience difficulties finding new employment

6.4.4 Nordrhein-Westfalen: Regional Agencies for Women in Work

The regional agencies “Women in Work” represent the main focus of equal opportunities policy in the Nordrhein-Westfalen Objective 2 programme. First set up in 1988, there are now 33 Women in Work agencies in Nordrhein-Westfalen, offering various services to improve the training and employment opportunities of women in the region. Each agency is free to develop its own services in conjunction with its co-financing local authority, but most offer careers advice, training, and advice on returning to work after a career break. The agencies are also required to build up direct contacts with local firms.

Some 18 of these Agencies are in the Objective 2 area. The Agencies have received support under the 1989-1993 and 1994-1996 programmes as well as the current programme. Funding has increased steadily over the three phases. The allocation under the current programme is 10.5 MECU, of which 4.2 MECU comes from ERDF. According to the SPD, in this phase the agencies are expected to carry out some 10,000 consultancies, 500 events and 250 publications or analyses.

The most difficult area of the Regional Agencies’ work is building up a relationship with local firms, especially SMEs. Some of the agencies have more of a sociological orientation, preferring to concentrate on areas such as careers guidance. From an economic development perspective, however, it is important that Regional Agencies also develop within the economic structure, engaging with local firms and helping women to start up in business. The impact of a Regional Agency is also connected to the value put on it by its funding local authority. Those given a higher profile are generally active in economic policy measures. At the moment, it is a fairly common complaint

that Regional Agencies are finding it difficult to gain acceptance and overcome prejudices about “women’s support” in the business community. Therefore, few agencies have been able to initiate innovative personnel policies in SMEs, and persuade them that cooperation with the agency makes good business sense.

An example of success in this area was highlighted in the latest interim report. The *Emscher-Lippe Alliance* is organised by a group of Regional Agencies in the Emscher-Lippe region. It aims to help firms and women employees reconcile family and work commitments. When women employees take maternity leave, the Alliance organises training and contact programmes to enable a smoother return to work. At the same time, firms are supplied with temporary staff from a pool of women wanting to return to work who have been trained under projects initiated by the Regional Agencies. The alliance offers every member firm bridging staff and advice on planning human resources, in return for a financial contribution to the alliance. This initiative therefore has four functions: (i) it helps to secure women’s jobs; (ii) it offers firms bridging staff; (iii) it trains personnel; and (iv) it offers advice on organising job positions and working time.

One of the goals of this programming period is to intensify networking between the Regional Agencies. As well as offering the opportunity to improve their activities through an exchange of experience, inter-agency alliances will help to widen the spatial effectiveness of each agency, which until now have been locally-oriented. There is already evidence of the formation of regional groupings. The agencies of Dortmund, Hamm, Unna, Lünen, and Schwerte have formed a regional alliance to network their activities so that all women in the surrounding areas can have access to their combined facilities. This cooperation also helps to increase efficiency and reduce costs. The alliance produces joint publicity materials to enhance the profile of the agencies and has organised joint symposien in order to provide advice to a larger audience.

6.4.5 *Nordrhein-Westfalen: Women in Work Project*

The Women’s Start-Up Centre in Hamm, on the north-eastern edge of the Ruhr, is regarded as one of Nordrhein-Westfalen’s most successful examples of combining equal opportunities and economic development promotion. The start-up centre is a cornerstone of the activities of the Hamm Regional Agency for Women in Work. Other services offered by the agency include careers advice for young women, help in returning to work after a career break, advice for women facing redundancy and information to firms and employees on the women’s support programmes available.

The women’s start-up centre, ‘Innenhof’, was founded in 1993 in response to the demand from women receiving start-up consultancy from the Regional Agency. When premises next to the Regional Agency became vacant in 1991, the Agency negotiated with the local authorities for the establishment of a dedicated centre for women entrepreneurs. It was the first centre of its kind in Germany; in the meantime, five similar centres have been established across the country. It has been noted that few women take advantage of the technology or general start-up centres in NRW. Women tend to need fairly

small units, and few have a need for the technological infrastructure. The Innenhof offers six small business units at below market rates for four years, with a possible two year extension. The entrepreneurs value the proximity to the regional agency and other women with new businesses for discussion of problems and mutual support.

Besides the provision of business space there are a number of other activities for new entrepreneurs:

- a seminar programme consisting of two basic three hour seminars per year followed up with specialised topics, such as bookkeeping, sales techniques, etc;
- a regular meeting place (*Stammtisch*) for informal discussion among the women for exchange of ideas and support; and
- a forum which builds on issues coming up in the *Stammtisch*, meeting around five times a year.

A survey was undertaken recently of women who had received start-up assistance from the Regional Agency in Hamm. It revealed that the average woman setting up in business is in her late 30s with two children over the age of six. She decided to set up because she wanted to make more of her strengths and talents (28%), because she found the activity interesting (25%) or because she had no other employment prospects (16%). Most women set up in services (33%) or trade (30%) and went into business alone. Importantly, these businesses gradually have begun to create jobs; the nine businesses set up in 1993 are now employing a total of 23 full or part-time staff.

6.4.6 *Nordrhein-Westfalen: Mainstreaming*

Equal opportunities issues are considered in all *Land* labour, economic and structural programmes, including those in the Objective 2 programme. The special arrangements for women within the “mainstream” promotion programmes are set out in the *Land Women and Work action programme*. These rules are intended to ensure a higher consideration for the special working and living conditions for women during programme formation, so that women have easier access to assistance.

Therefore the equal opportunities element of the Objective 2 programme has two strands. Alongside the specific measure for women in the form of the Regional Agencies for Women in Work, there is special consideration of women, or special conditions for women applicants, in many of the mainstream measures in the programme, as listed below:

- *grants for productive investment in SMEs*: the award per job created/safeguarded is increased by 25% for creation and safeguarding of jobs for women. In addition, there is a 3% additional award for projects with particular structural effects; projects which create mainly women’s jobs qualify for this additional award.
- *promotion of new firms*: women tend to undertake smaller start-ups, have less starting capital and need more risk capital. Therefore, in the measure offering start-up assistance for new firms, women applicants receive assistance for capital investment and running costs, whereas men are

eligible only for assistance for running costs; there is also a lower minimum investment ceiling for women, and they have access to loan guarantees of up to 80% of both the investment and running costs, whereas only the running costs are guaranteed for male investors. This measure also includes the provision of special financial consultancy for women.

- *promotion of investment in employment initiatives*: one of the aims of this measure is to support women in the labour market.
- *consultancy and advice to SMEs*: ensuring the inclusion of the theme of equal opportunities, this encourages SMEs to employ and promote female personnel adequately.
- *target group advice and consultancy*: the Business Initiative Agencies offer special consultancy to women returning to work and starting up in business, in cooperation with the Women and Work agencies.
- *trial projects for new services*: new jobs for women should be created and ways to avoid inadequate employment relations highlighted.
- *funding of business centres and start-up centres*: provision of facilities for employees with family commitments, in order to increase female participation in such institutions.

6.4.7 *Industrial South Wales: Chwarae Teg (Fair Play)*

Chwarae Teg (Fair Play) is an organisation set up to expand the role of women in the workforce. It was set up in 1992 with an action plan to tackle the barriers restricting women's participation in the labour market. It provides a service to women wishing to expand their participation in the workforce and a service to employers, matching their needs with the needs of potential female employees. It has the dual aim of helping SMEs become more efficient and competitive by aiding the recruitment/retention of female staff and developing new and existing businesses run by women. The scope of its projects includes ranges from business development, women's enterprise development and childcare development.

Among the positive aspects of the project are the following:

- it is strategically significant in that the whole of the programme area was targeted,
- it demonstrates synergy with projects previously supported with European funding,
- it seeks to address an unmet need within the programme area,
- it encourages networking and co-operation, and
- it encourages trade into new market areas and targets SMEs with growth potential.

The project has expanded to promote projects with a range of funding from Objective 2 to Objectives 5b and 3.

Chwarae Teg pursued a coherent strategy that has evolved over the time. Among the tools used in the course of development is a series of seminars which bring together policy-makers, projects sponsors and programme

managers. The agenda for these seminars is progressive - taking up new issues and exploring the best working methods for all stages in the process of integrating equal opportunities into programmes and policy-making. This type of networking, like that in Nordrhein Westfalen is a constructive way of involving other regional agencies and actors in the process.

The organisation has just completed an application for technical assistance money to do further work on the integration of equal opportunities into economic development programmes. The output from the project will be twofold - training tools and guidance notes.

For *Chwarae Teg* the question of mainstreaming is crucial. It recently held a seminar to promote awareness of the need to look at equal opportunities issues in the broadest manner. This means not just looking at projects in areas of traditional female participation but also looking across the board at the implication of projects for equal opportunities generally.

7. ISSUES AND QUESTIONS

A number of the issues identified in the paper are worth returning to as key questions relating to the integration of equal opportunities into Objective 2 Programmes and the recognition of women as players in regional development.

7.1.1 Equal Opportunities and Objective 2

The central question relates to the suitability of Objective 2 programmes as a vehicle for the promotion of equal opportunities. Equal opportunities has been a priority for longer in Objective 3 and *NOW*, and it has proved easier to define actions under these programmes. Among the difficulties in Objective 2 programmes, according to regional managers, is identifying what the Objective 2 programme can do which does not duplicate Objective 3 and *NOW* actions.

7.1.2 Regional Information

It is difficult to devise regional strategies to achieve integration without a comprehensive picture of what is happening in the regions. There is a clear need for comparable data and reliable information about the different regions. The Commission is working on guidelines in this area but the impetus here must also come from the regions.

7.1.3 Vive la Différence

The differential level of activity and incorporation of equal opportunities strategies into Objective 2 programmes must be situated within the different social, economic and cultural contexts of both the Member States and the regions. Recommendations and guidelines must take into account the diversity of practice and capacity when designing policy.

7.1.4 Co-financing and Partnership

The question of co-financing and partnership needs to be addressed. The widespread insistence by some Member States that the members of

partnerships should be organisations which put money into the programme militates against the participation of women.

The fact that women are not present in a representative and forceful capacity in the partnerships pushes them one step away from programme design and management.

7.1.5 Timescales

Objective 2 regions are former industrial areas which tend to have a high level of unemployment particularly among males. Programme managers are focused on job creation and managing complex programmes for economic development. Increasingly, the incorporation of complex horizontal priorities like RTD, environment and equal opportunities is demanding time, expertise and resources. The hectic pace of programming periods exacerbates this problem.

7.1.6 Good Practice and Exchange of Experience

The regional actors differ in their response to the provision of more guidelines by the Commission. Concern was expressed that Objective 2 programmes are becoming increasingly rigid and that regional distinctiveness is being eliminated. However, most underline the need to identify good practice, exchanging information and experience on all stages of the process from the design of programmes/regional strategies through to the monitoring and evaluation of strategies and projects.

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