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TECNICA

Executive Summary of the Thematic Evaluation of Gender Equality Report within the framework of the 2014-2020 programming period

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This report includes the main findings of the thematic evaluation of gender equality, defined in the "National Strategic Evaluation Plan of the ESF 2014-2020". In this evaluation, **all the operational programs of the ESF 2014-2020 have been analysed**, applying the evaluation criteria of the design, implementation, effectiveness, efficiency, results and impact around the measures that have been developed in favour of gender equality, **from the start of the operational programs until December 31, 2017**.

To carry out this report, a **mixed methodology** was implemented, combining the quantitative analysis with the qualitative one and triangulating the results for the evaluation. More specifically, an exhaustive documentary review of all the regulations and all the documentation of programming, execution and evaluation of the OPs relevant to the object of evaluation has been carried out; all the information regarding the indicators of productivity and results available from the annual implementation reports (2015-2016 and 2017) and the operational programs has been compiled, treated and statistically analyzed in an aggregate manner; a consultation was made through a telematic platform to all the Intermediate Bodies of the operational programs of the ESF and direct beneficiaries of the Management Authority, on the one hand and, on the other, to territorial equality bodies regarding their perception of the various evaluation criteria; Six case studies of regional operational programs representative of the diversity of programs underway in the ESF have been analyzed, through interviews and analysis of different types of documentation for each of the programs. Finally, eight actions have been compiled that can be considered good practices from different perspectives in the application of the principle of gender equality (some are specific measures and others are actions of a more transversal nature or tools to enhance the application of this principle).

Has the gender perspective been incorporated into the design of the ESF OPs? Is the ESF focusing on the priority or substantive problems in this area?

- The **Association Agreement**, a reference document for the operational programs, includes the precept of respect for the principle of equality between men and women and non-discrimination, but does not propose a clear strategy or methodology for effective integration into ESF programs. This deficiency is transferred in the programming chain, so that a **certain deficit is detected in the standardisation of the principle in all phases of the programming**, which translates into a lack of precise orientations or the availability of specific mechanisms for its application.

Therefore, in the next programming period it is advisable to include **strategic priorities regarding gender equality**, accompanied by the necessary means to carry out the planned actions following those existing at the national level.

- On **the other hand, it can be affirmed that, in general terms, the strategic documentation** that governs the European Social Fund programming **is coherent with the main normative lines** on gender in force in the State, presenting a considerable alignment with them, although the Synergies detected in the frameworks for action are more evident in the workplace than in the social inclusion or education/training.
- The establishment of **the gender gaps identified in the initial diagnosis** at the beginning of the program (2013) **and the solutions** programmed to respond to them, reveals a **certain imbalance**, insofar as **these challenges have been assumed with different intensity levels**. Thus,

the intervention strategies linked to the promotion of employment converge more clearly with the needs and challenges identified, than those defined to promote social inclusion or those defined in the field of training and education. Added to this is the **challenge of defining more strategic action proposals, which jointly consider the various dimensions of inequality in the area of action in question** (for example, the challenge of women's incorporation), employment must be addressed by actions that facilitate not only access to employment, but also promote quality, and avoid sectoral and vertical segregation).

- In general terms, the programming process has detected, as a result of the absence of a strategic operational approach for the application of the principle of gender equality, a **design of the actions lacking a gender impact analysis** to identify, on the one hand, the factors that produce the inequalities to be able to intervene in an effective way, and on the other hand, the conditioning factors that can determine the success of an action.

It is an achievement of the programming the fact that **women are considered a priority group in all cases**, which undoubtedly places them in a privileged position to be beneficiaries of the different actions of the ESF. However, the absence of an assessment of the gender impact of the operations in the terms proposed may have caused the application of this principle in some cases to generate the opposite effect to that desired, or not all possible results are achieved.

Assuming the general nature of the document of selection criteria for operations, elements of improvement have been detected in the **definition of the selection criteria** regarding greater adequacy and specificity to respond to the needs identified beyond the established general principles.

Considering the general nature of the Operational Programs, it would be desirable to propose the design of some type of operational instrument, prepared by the Management Authority together with the competent equality body, in order to systematize a **practical method** that will guide the different agencies responsible for the management of the programs to **operationally incorporate the gender perspective, mainly into the programming processes**. In this sense, the articulation of some "intermediate" programming document could be useful where the gender impact of each of the planned actions is explicitly expressed, and the way in which it hopes to approach transversally the gender perspective transversally to respond to the challenges in each Program.

- The **mandatory nature of the issuance of the Equality Opinion** linked to each of the ESF OPs has been a great achievement for the defence of the equality principle, and above all it has been a **very useful** instrument to reflect in different areas on the incorporation of the gender perspective in programming. It is therefore considered necessary to develop **specific monitoring of its continuous and coordinated application** among all the agents involved in the management of the programs, with a fundamental role of the equality bodies (which could be shared in the Monitoring Committees).
- Regarding **information and communication**, the gender perspective has been a principle considered in the phases of design and implementation of the OPs in a generalist manner, without identifying only specific measures, with exceptions. The **use of non-sexist language is still a fundamental challenge** for all operational programs.
- The **monitoring and evaluation** system of the ESF programming safeguards the obligation to disaggregate the indicators collected by gender. However, there are a minority of programs that have envisaged specific gender indicators that make it possible to measure beyond levels of

participation and provide information on results with a gender perspective. On the other hand, although for the **determination of productivity indicators and results** in some cases, especially in the pluri-regional programs and in some regional ones, an effort has been made to update the objective values to the detected gaps, in other cases these values. The objective seems to be more determined by the historical reference data of previous actions, not paying attention to the dimension of gender gaps detected beyond the marked prioritization of women's participation. All this may have a clear impact on the results of the elimination of gender gaps.

Therefore, it is urged to **consider the incorporation of specific gender indicators** in all those actions in which a gender gap had previously been detected and one of its purposes is the promotion of equal opportunities. Likewise, it is recommended to carry out a reflection to improve the **annual reports of execution** regarding **giving visibility to compliance with the incorporation of the gender perspective**.

What role has equality bodies played and should play?

- Although all OPs were envisaged by close cooperation and participation on the part of **the territorial equality bodies** in the different processes of programming and its implementation, this can be described as **irregular**, which is materialized in a **diluted image of the role played by these organisms**, despite their desire and willingness to have a more proactive and protagonist role. The main milestones of collaboration have been the elaboration of the equality opinions and their participation in the program monitoring Committees. To the extent that there was no standard operating procedure, **the participation and role** of equality bodies is **articulated by their availability regarding human resources, recognition and ability to influence**.
- However, equality bodies not only play this role of mainstreaming the gender perspective and the application of the principle of equal opportunities, but also manage various **programs or specific measures**. These are programs that are aimed at women, who already have a long history and who attend to very specific needs of intervention in the field of employment generally. In this sense, it is worth asking whether this type of actions should progressively be assumed by the competent body in the matter, once its necessity and effectiveness have been demonstrated, and if its work should focus on the promotion of innovative actions, the development of "pilot" initiatives" or experimental to respond to unresolved needs, in parallel with its role of mainstreaming the gender perspective.

The need therefore arises for a reflection on the importance that should be given to the regularity in the participation of the **organisations and equality** in the monitoring committees, and to the leading role that they must have in monitoring the implementation of the gender perspective in the life cycle of the OPs. For this reason, it is necessary to envisage and articulate **mechanisms that allow for the incorporation and consideration in an operational manner of the specialised organisms in the field of gender**, with a standardised and regulated character. Therefore, the **mechanisms to strengthen their involvement and contribution** must be articulated.

One element in which the collaboration of both types of organisations converge is the **Network of Equality Policies between Women and Men in the community funds**. Given that the participation of some organisations and others in this network is quite unequal, mechanisms must be articulated to favour their empowerment and the best use of the tools available to this network.

How is the principle of equality in the implementation of the OPs being applied?

- In response to the various testimonies, **the inclusion of the gender perspective seems to have been diluted** to the extent that in the period analyzed, efforts have focused mainly on the prioritization of execution and certification, due to the delay in initiating this period and, on the other hand, to a strictly regulatory vision of the application of the principle of equality.
- In this context, although there has been **some inertia in the implementation of actions from the side of the** intermediate bodies, the innovation that has been observed in the period covered by the evaluation has focused mainly on the actions programmed by the **agencies** of the third sector, who are the **ones who have mostly opted for the development of innovative and experimental actions**.
- The monitoring system in physical and financial terms has shortcomings regarding inclusion of the gender perspective. To carry out an analysis of **financial performance**, there is not enough information to determine the effects of the application of the principle of equality. On the other hand, in general terms, **the specific indicators** provide more detailed information on the development of the actions, but these have not been considered in all the programs, reducing the possibilities of a more precise follow-up.

In the **productivity indicators** established in the monitoring system, it is recommended to emphasise the need to carry out a disaggregation by profiles of the indicators of the participants, which will make it possible to refine more the objective of the programming and the results that are to be obtained. Likewise, it is urged to **contemplate the incorporation of specific gender indicators** in those occasions in which the action has a marked nature and aimed at mitigating situations of inequality between men and women.

In order to measure the progress and evolution of all indicators of the monitoring system linked to gender, it is recommended to assess the **possibility of establishing**, whenever possible, **a initiation point and a milestone** in each of the actions planned with the objective of deepening the progress made, in order to be able to carry out also an analysis of the efficiency.

What is the ESF contributing to gender and what else can we expect?

- The observable results regarding gender in the framework of the ESF programming **are not attributable only to the ESF**, even more so if we take into account that the incidence of ESF is a minimal proportion of the total number of policies implemented in the territories.
- In general terms, it is observed that **a greater financial intensity or volume of actions does not necessarily have an impact on better results regarding gender**. In this sense, greater efficiency is observed in those cases in which the design of the action is developed in management frameworks with sensitivity/commitment and closeness to users. Specifically, it is observed that those actions that have been led by **the entities of the third sector have obtained better results in the improvement of the situation of women**. This fact would be motivated by their greater and better knowledge and proximity of the territories of influence and the processes of rapprochement/recruitment of ESF users, by the special motivation of their personnel, and by having in many of the cases with personnel formed in gender matters.

Therefore, it is recommended **to encourage the participation of third sector entities** in the framework of ESF programs to continue promoting their role as **agents of transformation and experimentation in the territory**. Given the good results obtained, it may be of interest to enhance the transfer processes of good practices.

Quantitatively, the actions that are **focused on a specific target audience**, as in the case of OT 9 of the POISES, **are working better and obtaining better results** than actions with a more general nature. In this sense, up to now, the main results seem to be in the **most vulnerable groups of women**, especially those of women in the rural context. All of this is fundamentally thanks to the development of **specific actions aimed at women** managed by specialised entities in the field.

It is therefore essential **to strengthen** the development of a **dual strategy** from all perspectives and agents, strengthening the implementation of **specific measures** that have proven effective in intervening especially with vulnerable groups of women; but without neglecting **the mainstreaming of the gender perspective**, since inequalities manifest themselves in all areas of ESF intervention.

- The ESF continues to be a mobilising instrument of technical and financial resources that **acts as a tractor of other public policies of the territories regarding gender**. Therefore, its contribution stands out regarding the **mobilisation of synergistic resources** among the initiatives developed in different frameworks. Thanks to the trajectory of the ESF in Spain, management structures in the administration have internally consolidated the horizontal principle of gender equality in their work processes. In this sense, the work in the ESF **framework has contributed significantly to sensitise public institutions in gender matters**, which has favoured a greater **gender awareness among all the staff that manages ESF policies**.

This positive impact of the development of gender-related actions and the mandatory application of the principle of equal opportunities between women and men has also been transferred to many of the **management bodies** over which their actions have been monitored and monitored gender matter.

- The incidence of ESF is linked to **the mobilisation of resources to promote unique actions** that have a very positive impact and that could not have been implemented without the impact of this fund. It highlights positively the impulse of **actions in the rural territories**, favouring the employability of women in some territories.

How to overcome the main barriers that hinder the maximisation of the impact of ESF on gender issues?

- Most intermediate bodies share the demand for **more expert staff or with specific training in gender**. In this regard, giving greater impetus in the current programming period to compliance with the principle of equality between women and men is fundamentally due to effort in **the training of personnel** that is most directly involved in the execution and follow-up of actions, so that their sensitization in this regard allows internalising this principle and integrating it in a transverse and natural way during the start-up of the OPs. It is considered necessary to establish **information, awareness and training activities among the beneficiary entities on gender equality** led by the equality bodies, in a coordinated and structured manner with the objective of maximising the efficiency of the available resources. In this sense, the Interinstitutional Technical Working Group on Equality in the Funds of the Basque Country can be a reference of considerable interest.
- The **maximization of the impact on gender issues** is, however, in the first place, due to the strengthening of the **institutional commitment** on this issue, which in turn translates into a commitment to **strengthen the role of equality bodies** as guarantors of the application of the principle of equality, and by the effective mainstreaming of said principle in all public policies.

In this sense, collaboration **on the part of gender specialists** (gender units of some regional governments) with the people responsible for the management of the programs can **contribute positively to establishing mechanisms to promote and monitor** gender equality actions in the region the territories.

- Due to the difficulties that many intermediate bodies manifest in monitoring the application of the gender perspective by the managing bodies, it is considered appropriate to **articulate mechanisms such as public calls for assistance** in which access criteria are established compliance with certain gender requirements of a transversal and/or specific nature (incorporation of personnel with gender training, diagnosis of gaps, evaluation of the gender impact of the actions).