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Gender - sensitive and women friendly public policies:  
a comparative analysis of their progress and impact

Deliverable 3: **Methodology  
Report**

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This report outlines the project's research design and methodology. It is organised into five parts. The first briefly introduces the objectives of the research, describing the scope and purpose. The second section outlines the development of conceptual thinking on equality and inequality as they relate to gender. The next section focuses on how gender equality has been developed in policy, outlining the different approaches which have been taken to gender equality in public policy and analysing the extent to which these approaches are to be found in the eight country cases. Section four seeks to elaborate the study's key research interest in the possible benefits of gender equality for the quality of public policy making. The final section then goes on to specify and develop the methodology and research design. This means that section five discusses in turn how the key research questions are to be operationalised, criteria for choosing and the actual policies to be studied in the different countries and the study's methodology, in terms of its general approach, the methods of data collection and of data interpretation and analysis. One appendix, describing the specific policies that will be studied empirically in each country, accompanies the text.

## 1. OBJECTIVES OF RESEARCH

The purpose of the research is to study the eight countries in terms of:

- The **nature and development** of gender equality in national policy and, in particular, the **progress** that each country is making towards mainstreaming gender in public policy;
- An assessment of how the integration of gender **affects** policy making, in particular whether and how it acts to improve the quality of policy;
- A **comparison** of the approaches followed in the individual countries as well as how each compares to the EU approach;
- Identification and assessment of **good practice** in women-friendly and gender-sensitive policy making.

By way of overview, we can say that the study will examine and compare countries on the **content and progress** of their gender equality policies (what is understood in the country (and policy domain) to constitute gender equality and in particular a mainstreaming approach, how it is advanced and progressed and the relationship between the national and EU approaches) and also **some benefits** associated with the adoption of a gender approach (in particular in terms of leading to an improvement in the quality of policy and policy making).

An additional objective of the research is to identify and assess examples of good practice in terms of the treatment of gender equality in public policies. Examples may be drawn from the eight countries under study, and also from the study of women-friendly and gender-sensitive policies in countries that have made substantial progress on gender mainstreaming. The interest here is to identify the lessons of these good practices, with the aim of informing approaches to gender mainstreaming in public policy at EU and national levels.

Gender is the core of the research. The title of the research study mentions 'gender-sensitive and women-friendly public policies' as being the subject of study. Gender-sensitive means 'addressing and taking into account the gender dimension', while the gender dimension is defined as "the aspect of any issues which relates to gender/the

differences in the lives of women and men” (EC 1998). Women-friendly, on the other hand, incorporates the notion of gender equality. Gardiner and Leijenaar (1997, p. 61) define women-friendly policies as the “broad range of options available to European governments to improve the status of women, the adoption of and implementation of which reflect the existence of a culture of equality”.

One of the first tasks, therefore, is to identify how gender equality has been developed in academic or conceptual work and also how it has been adopted as a goal in the policy arena. These two discussions are the subject matter of the next two sections.

## **2. THE CONCEPTS OF GENDER EQUALITY AND GENDER INEQUALITY**

Equality and inequality as they are applied to gender have given rise to two rather different literatures. It is therefore important to consider the two concepts separately.

### **2.1 Gender Equality**

One of the central aims of this research is to study how the implementation of gender and women’s equality policies is proceeding across Europe. There is broad agreement that these policies have a common goal, namely, to achieve gender equality. But ‘gender equality’ is a contested notion.

Scholarship on gender equality has developed the concept in relation to the dualistic pair of ‘sameness/difference’. Depending on where it is positioned in relation to that pair, gender equality has very different meanings. Seen through the lens of feminist research, three historical developments in the thinking on gender equality can be distinguished. These are: the equal treatment (or equal rights) perspective, the women’s perspective, and the gender perspective (Rubery et al. 1998; Booth & Bennett 2002).

The equal treatment (equal rights) perspective was the dominant perspective in what has come to be called ‘first wave feminism’, a period in which feminist theory and action was largely informed by liberalist principles and theory. In this period feminist struggle was for a formal equality for women within the existing system of rules and laws. One of the key exponents was Mary Wollstonecraft, who argued that women are rational by nature and therefore are entitled to citizenship rights on equal terms to men. The equal treatment perspective, thus, promotes actions that guarantee women the same rights and opportunities as men in the public sphere. Gender equality in this perspective is based on the idea of ‘sameness’ between women and men, with the dominant male norm remaining unchanged. When articulated in policy, this perspective usually takes the form of legislation to give women and men equal rights.

The women’s perspective was the dominant perspective during the so-called ‘second wave feminism’. This is a period between the 1960s and the 1980s characterised by a multiplicity of currents in feminist thought - each related to a particular theoretical framework. Philosophical approaches such as existentialism, liberalism, Marxism, socialism, psychoanalysis were each analysed and utilised to develop a feminist approach. Although there is a large variety of second wave feminisms, all share the assumption that women and men are the same but unequal due to a variety of factors such as different socialisation, the economic arrangements in the capitalist economy or the way in which children and parents interact from the beginning of life. In general, the perspective sees women as a disadvantaged group, having been subjected to a history of discrimination and/or exploitation and therefore requiring special treatment in order to rectify that past. Gender equality in this view is based on the idea of ‘sameness’ between women and men,

but within a new norm for both women and men. When translated into policy, it usually takes the form of positive action.

The gender perspective has been linked to third wave feminism, which emerged in the late 1980s, offering a profound criticism of the main theoretical tenets of second wave feminism. The gender perspective promotes equality based on difference, through attaching equal value to female and male norms within a gender-segregated society. This perspective emphasises the differences between women and men and is premised on the understanding that men as well as women can be disempowered by current social/cultural arrangements. In policy, this perspective is usually expressed in terms of gender mainstreaming (Arneil 1999, pp. 152-70; Booth & Bennett 2002, pp. 433-34).

Third wave feminist theory has taken issue with supposedly sex-blind versions of equality that require women to simulate the activities of the men who constructed the norms. As a number of authors have noted, the idea that equality depends on everyone being treated the same can be regarded as an inequitable assimilationism that imposes the values and norms of one group on those who were historically subordinate (Phillips 1999, p. 25). Equal treatment requires everyone to be measured according to the same norms when in fact there are no 'neutral' norms of behaviour and performance. According to this line of argument, where some groups are privileged and others oppressed, the formulation of law, policy and the rules of private institutions tend to be biased in favour of the privileged groups because their particular experience implicitly sets the norm (Young 1998, pp. 421-22).

Such an assessment is part of a wider feminist critique of modern liberal political thought and its application to issues of gender equality. According to this critique, the claim of equality that is central to the liberal framework is grounded in a rejection of relations of domination based on differences and on the assertion of the existence of a fundamental human 'sameness' overriding such differences, like the possession of the same natural rights (Flax 1992). Thus, in liberal political thought, difference is always treated as the problem that needs to be rendered irrelevant or eliminated.

In the face of these feminist and other critiques of liberal notions of equality, the concept of difference has emerged as one of the central motifs in feminist analysis today (Phillips 1998, p.12). This new perspective focuses on the recognition, valorisation and celebration of gender difference. Such thinking has found its way into policy, where one can see a clear shift of emphasis from equality to difference. However, this new emphasis on gender difference is itself highly controversial for a number of reasons.

For one it has been argued that, in emphasising gender differences, this perspective creates an image of women and men as qualitatively different categories. The gender perspective, in other words, celebrates gender differences and in doing so runs the risk of essentialising them. According to Rhode (1998), while strategies that deny gender differences have ignored women's particular needs and circumstances, many approaches seeking to celebrate women's distinctive attributes have homogenised and essentialised them. Essentialism in this context refers to the attribution of a fixed essence to women, which is usually seen to reside in women's biology and other characteristics such as nurturance, empathy, supportiveness, non-competitiveness and so on (Grosz 1994, p. 84). One potential problem is that this kind of scholarship tends towards reductionism either biological and/or psychological. Another weakness is that the scholarship undermines the social nature of gender and also under-emphasises the common or shared aspects of women's and men's experiences.

A second criticism of the recent shift from equality to difference in feminist theory is that it fails to capture important inequalities in society, in particular socio-economic inequalities. One of the key exponents of this line of criticism is Nancy Fraser (1995; 2000). According to her, the move from a predominantly class understanding of equality to an understanding that focuses on difference in relation to gender, ethnicity and race has acted to undermine the idea of equality as a socio-economic matter.

Fraser (1995) points out that this shift is reflected in feminist scholarship which has also seen a move from socio-economic redistribution to cultural recognition as the main concern of political struggle. She offers insights into how the shift occurred. She locates the shift historically in that in the past the struggle for equality was primarily a class struggle. However such a view of equality was not very useful for feminists because it fails to distinguish significantly between the conditions of women and men. Hence, feminists needed to develop a broader understanding of equality, one which not just recognises differences but focuses centrally on them. Fraser therefore helps us to understand why the shift from sameness to difference was necessary but she also identifies some of its consequences. She sees feminist scholarship as having become very polarised. Fraser is especially critical of a tendency in recent feminist theory towards not just a focus on difference as cultural but the hegemony of cultural difference to the relative exclusion of socio-economic differences.

Fraser's work offers a number of insights relevant to the current project. First, she warns us against thinking about gender in terms of dualisms and dichotomies and suggests that to avoid polarisation we should endeavour to see equality in a complex way. She also demonstrates that it is possible to have a view of equality that is inclusive rather than exclusive. This and other work (Bourdieu 1998; Valian 1998) reminds us that one of the features of gender inequality is its underpinning in largely unconscious and unspoken beliefs and values that privilege traits and qualities associated with men while devaluing those associated with women. Valian (1998) has used the term 'gender schemas' for largely unarticulated (and even consciously disavowed) beliefs and values carried by both women and men about gender differences, which lead to unequal evaluation and treatment of men and women, and of behavioural traits associated with masculinity and femininity. While individually the differential treatment may be small, the advantages and disadvantages accumulate over the longer term, resulting in large disparities in income, promotion and prestige.

A subject of some debate has been the extent to which these differential norms and values are open to change, with some feminists criticising Bourdieu's focus on the underlying systems or structures of male domination as implying female complicity in their subordination (Armengua 1993; Alexander 1995). However, as others have noted, the dynamic and dialectical nature of gender difference inequality means that change is difficult, and its effects can often be contradictory (Blöss 2002). Overcoming gender inequality thus requires not so much eliminating gender differences, but changing the cultural beliefs and norms that give greater value to men and masculine traits and that disadvantage women and female traits.

To summarise, the gender perspective, focusing as it does on difference, represents in our view a major development in the thinking on gender equality. It offers a profound critique not just of policy approaches but also of the conceptual and philosophical foundations of theoretical thinking about equality. For these and other reasons it is important that this perspective have a central place in the current project. It is important also that the current research operate with a notion of equality that incorporates difference, thereby moving

beyond a view of equality as formal equality or equal opportunities. However, the project also takes very seriously the criticisms that have been made of gender difference. Therefore, in analysing the different notions of equality embedded in public policy in the EU and the eight country cases, the project will operate with a notion of equality as a complex concept, without prioritising socio-economic or cultural components. This means also looking for and at differences among groups, especially groups of women in different social and cultural situations. The project will develop an interest also in how gender is related to other types of equality.

## **2.2 Gender Inequality**

Part of the appeal of the concept of equality is that it contains a big vision, having embedded in it a view of society and of relations between women and men. To that extent it is idealistic. However, given the generality of the meaning of gender equality, and the fact that it is a concept that is open to multiple interpretations, some analysts prefer to take gender inequality as their main focus. Gender equality, then, serves the purpose of a guiding principle or ideal whereas gender inequality turns attention to a concrete 'real world' problematic.

The literature on gender stratification is among the most relevant bodies of work on gender inequality. This literature is mainly concerned with explaining, interpreting and documenting gender inequalities in society. It is quite a particular literature and, running a risk of oversimplification, could be said to contain two main strands.

The first undertakes a critique of traditional stratification theory as gender blind and charges it with focusing too much on class and too little on other axes of stratification such as gender (Walby 1986). This literature makes the case for gender as a primary form of social stratification (Crompton & Mann 1986). Some of these studies stress the importance of taking adequate account of women's participation in class relations in their own right rather than as wives and daughters. Walby (1986), for example, challenges the notion of class implicit in traditional theory, arguing that a revised notion of class should be able to account for gender inequalities and women's exploitation. In her approach, class is only partly determined by labour market position. Other types of common work, such as housework, are also determinant of class. Thus, wives (not women) should be considered as forming a class of their own so that, while single women in wage labour take their class position from their own occupation, married women have a dual class position deriving from their paid work and their position as wives engaged in housework (ibid, p. 39).

The second strand in the literature on gender stratification is more empirical and investigates the manifestation and nature of gender divisions within different domains. This is the larger body of literature with feminist critiques of traditional stratification theory laying the ground for a thriving field of research that seeks to elucidate the position of women in a class society. In this literature, gender stratification refers to the unequal distribution of income, status and resources between women and men. The labour market, the (welfare) state and the family are especially relevant as spheres of resource (re)distribution. Within the labour market, women are confined to particular positions and professions giving rise to significant horizontal and vertical segregation (Rubery, Smith & Fagan 1999). Within the family, there is an unequal distribution of income and non-material resources such as leisure (Daly & Rake 2003). Finally, the welfare state has been shown to reinforce gender inequalities by supporting and promoting certain sets of behaviours and punishing others (Sainsbury 1996). For example, the welfare state can further the feminisation of poverty by failing to provide adequate and affordable childcare,

or by giving the main child and family benefits to fathers rather than mothers, or by encouraging lone mothers into low-paid, low-skilled jobs through the introduction of benefits and tax credits, and so forth.

To summarise, gender inequality is as a concept or approach closer to policy and policy analysis than is gender equality. This is so for two reasons. First, the ‘problem’ that policy constructs and sets out to deal with is gender inequality rather than equality. Secondly, in the field of research, policies concerned with gender have been studied much more from a gender inequality perspective than from a gender equality perspective. For these and other reasons, it is important that the current project keep a focus on gender inequality as well as on gender equality.

### **3. GENDER EQUALITY IN POLICY AND PRACTICE**

The central concern of this research is how gender equality policy in general, and gender mainstreaming in particular, is being viewed and implemented in practice in the eight country cases. This section now turns the attention on policy. It is divided into two parts. The first is the more abstract and considers how gender equality has been defined and conceptualised for policy purposes. In the second part we turn the lens on practice in the eight countries, enquiring on the basis of the information available to date into the approach being taken to gender equality in general and in the two policy domains of social protection and education. The main purpose of this preliminary investigation is to inform the design and development of a research framework for the study.

#### **3.1 Policy Definitions of and Approaches to Gender Equality**

For policy too, equality in relation to gender is a complex matter. Many definitions of gender equality are to be found among policy-making bodies and related institutions. The following three definitions, issued respectively by the Council of Europe, the OECD and the Canadian government, provide an idea of how gender equality is broadly understood for policy purposes.

- 1) “Gender equality means an equal visibility, empowerment and participation of both sexes in all spheres of public and private life. Gender equality is the opposite of gender inequality, not of gender difference, and aims to promote the full participation of women and men in society”

Source: Council of Europe 1998 (available at [www.humanrights.coe.int](http://www.humanrights.coe.int)).

- 2) “Gender equality requires equal enjoyment by women and men of socially-valued goods, opportunities, resources and rewards. Gender equality does not mean that men and women become the same, but that their opportunities and life chances are equal. The emphasis on gender equality and women’s empowerment does not presume a particular model of gender equality for all societies and cultures, but reflects a concern that women and men have equal opportunities to make choices about what gender equality means and work in partnership to achieve it”

Source: OECD 1998 (available at [www.oecd.org](http://www.oecd.org)).

- 3) “Gender equality means that women and men have equal conditions for realising their full human rights and potential to contribute to national, political, economic, social and cultural development and benefit equally from the results.... Attaining gender equality demands a recognition that current social, economic, cultural and political systems are gendered; that women’s unequal status is systemic; that this pattern is further affected

by race, ethnicity and disability; and that it is necessary to incorporate women's specificity, priorities and values into all major social institutions”

Source: Status of Women Canada, 1995 (available at [www.swc-cfc.gc.ca](http://www.swc-cfc.gc.ca)).

All three definitions are similar in their general idea of equality. It is framed in terms of equal rights and opportunities for women and men in different spheres of life. This is a very general characterisation of gender equality and, as such, attracts a wide consensus. However, its generality means that it runs the risk of being devoid of content. Once we move beyond this general idea of gender equality, it becomes a much more contested concept. Apart from this, how gender equality is to be achieved in practice is far from given in any of the definitions.

It is possible to bring order to the field, however. Scholarship suggests that there are three ideal types of policy approach to gender equality: equal treatment, positive action and gender mainstreaming. The main features of each approach along a range of dimensions are as follows:

**Table 1 Policy Approaches to Gender Equality**

APPROACH	DIAGNOSIS What is wrong?	ATTRIBUTION OF CAUSALITY Who/what is responsible for the problem?	PROGNOSIS What should be done?	CALL FOR ACTION Who should take action?
Equal Treatment	There are different laws/rights for women and men	Individual responsibilities	Change the laws towards formally equal rights for women and men	Legislators
Positive Action	Unequal starting position of women and men. Women as a disadvantaged group	Diverse, both at individual level and at structural level	Design and fund specific projects to address the problems of (specific groups of) women	Women's equality agencies, sometimes together with established institutions
Gender Mainstreaming	Gender bias in policies and social institutions	Policy makers	(Re)organise policy processes to incorporate a gender equality perspective in all policies	All actors routinely involved in policy making

Source: Adapted from Verloo (2001).

The equal treatment approach focuses on legislation for its analysis of the problem and its suggested remedies. Women are treated unequally because they have different, often inferior, rights to men. The solution to this lies in a change in legislation whereby women are granted rights that are formally equal to those available to men. Legislators are therefore the key agents of reform. With a focus on the public sphere and the differences between women's and men's participation therein, the woman (and man) as worker is the dominant model here. Equal rights in relation to employment, therefore, are treated as pivotal, especially issues relating to pay, promotion, pension and social security in general. Over time the limitations of this approach have been laid bare: the assumption of sameness between women and men, the lack of attention to the private sphere and the relative failure to recognise that inequalities are structural in origin, *inter alia* (Rees 1998).

Positive action offers an alternative approach. It regards women as a disadvantaged group and so, in order for them to take their place on a similar basis to men, they must be the recipients of particular interventions and measures. Programmes and projects specifically for women are the preferred remedy in this approach. This has led to a specialisation of policy – women’s policy – and to the growth of policy agencies or units directed specifically towards women. One of the main criticisms of this approach is that, while it recognises that there is a structural element to women’s condition, it does little to address the predominance of the male norm. Another criticism is that it tends to treat women as a homogeneous group. In sum, positive action has been said to be weak in bringing about structural change (ibid).

Gender mainstreaming is seen to offer an improvement, building on the strengths and also the known weaknesses of the two existing models. This approach moves away from a sole focus on women and has the potential to regard men as a disadvantaged group (e.g. in relation to their rights as fathers or family members). Society itself is at fault in this view, creating through social practices and structures fixed and gendered role models and expectations for women and men. While this approach focuses on society for its analysis of the problem, it turns mainly to policy making and public institutions for its remedies, regarding them as flawed in their existing form, serving to reinforce inequalities as well as reproduce them. Awareness and knowledge are critical agents of change in this approach and, hence, giving policy makers training and better information as well as enabling them to change their attitudes and practices are key inputs. Policy making itself is also to be altered in this view, however, by the introduction of new tools (such as gender impact assessment), new procedures or practices (such as consultation and monitoring/evaluation) and new resources (such as specialist gender units or observatories). Since this approach is still relatively new, a body of critical literature on it has yet to develop. However some weaknesses that have already been suggested include its ‘softness’ (the fact that instead of legislative change it mainly calls for changes in process), its lack of precision (in that it can cover a whole range of policy actions), its focus on tools (which might mean that mainstreaming becomes an end in itself rather than a way of tackling inequalities), its malleability (in that it lends itself to a claim that action is being taken when in fact the measures may be cosmetic), the implied move away from a focus on the specificity of women’s situation and the downgrading or under-resourcing of agencies working specifically with women (Pollack & Hafner-Burton 2000; Shaw 2001; Verloo 2001).

These are ideal-type approaches, their main value being that they introduce some order in our thinking about the development of gender equality in policy. In practice, however, the three models are not separable but are intertwined and build upon and interact with one another as approaches to the problem of gender inequality. This is in some contrast to the theoretical work where each approach tended to be represented as an improvement on or opponent of its predecessor. In practice, all three approaches as they are applied in policy complement each other and should be seen as evolving together.

### **3.2 The Existence of the Different Approaches in Practice**

Having set out these ideal types, we will now look at the extent to which the models are identifiable in practice in the EU and the eight country cases. While this analysis draws on the work submitted by the partners in Deliverables 1 and 2, it has also involved new research especially since work completed to date focused mainly on positive action and gender mainstreaming whereas we include here also equal treatment. In the section to follow we look first at whether the different approaches are to be found in the country’s

general policy framework and following this we investigate the relevant measures to be found in the two policy domains of education and social protection.

### **3.2.1 General Policy Profile**

#### 3.2.1.1 Equal Treatment

This approach is to be found in all countries under study and mainly takes the form of equal rights, or anti-discrimination, legislation (see Table 2). Taking an overview of practice across the countries on the basis of the information available at this stage, a number of points about equal treatment are noteworthy:

- It is important to note first that an equal treatment approach continues to operate today. That is, although it is no longer prioritised by the EU, some study countries (France, Ireland and Lithuania) have recently introduced legislation which is underpinned by this approach to gender inequality. This underlines the need to investigate empirically in the present study the extent to which an equal treatment approach is still influential within and across countries.
- Most of the relevant legislation concentrates on the areas of employment and social security, and education to a lesser extent. However, in Ireland and, to a lesser degree, the UK, equal rights legislation also extends to other areas such as the provision of goods and services.
- Most countries show evidence of indigenous policy activity around an equal treatment approach. Greece, Spain and Lithuania are exceptions to this, however. One could say that these countries have imported an equal treatment perspective by virtue of having to adopt equal treatment directives as a condition of EU accession. In addition, these countries tend to have few or no specific pieces of legislation directed at equal treatment; rather this principle is incorporated into general legislation such as the Constitution.
- Countries vary also in the extent to which they have put in place mechanisms to monitor and enforce equality legislation. France, Ireland, Lithuania, Sweden and the UK are the five countries which have put in place dedicated enforcement and monitoring bodies.

Overall, the equal treatment perspective has a strong influence on gender equality policy at national level in contemporary times. The extent to which such an approach is followed varies from country to country however. The two countries where this approach could be argued to be most influential are Ireland and the UK.

**Table 2 Universe of Gender Equality Policies in Countries under Study by Approach to Gender**

COUNTRY	RANGE OF MEASURES ACCORDING TO TYPE OF APPROACH TO GENDER		
	Equal Treatment	Positive Action	Gender Mainstreaming
<b>Belgium</b>	Collective Agreement, no 25 (15/10/75); Economic Reorientation Act, 1978 (section V); Equal Treatment Act, 1999	Tax deduction for childcare expenses	Strategic Plan for Equality Affairs; Parental leave; Paternity leave; Time credit; Tax and pension reform; Gender mainstreaming in universities;
<b>France</b>	Loi Roudy, 1983; Loi Genission, 2001	The development of childcare supply; Integrated child benefits; The “Scientific And Technical Vocation for Girls” prize; Taskforce on Parity in Science and Technology	Platform for integrating gender into all policies; Paternity leave; Pension reform in public sector; Promoting equality in the education system; Career desegregation campaign
<b>Greece</b>	Greek Constitution, 1975 (art. 4; art. 22); Laws 1414/84; 1423/84; 1424/84; 1483/84; 1576/85	EQUAL; Operational Programme: Child and Elderly Care Facilities; Regional Operational Programme: Childcare; Programmes for the support of women’s studies and the support of women during undergraduate and postgraduate studies and for female researchers	Reforming curricula; Pension reform

<b>Ireland</b>	Employment Equality Act, 1998; The Equal Status Act, 2000	Equal Opportunities Childcare Programme; National Anti-Poverty Strategy (women as a target); Equality for Women Measure; Individualisation of social assistance payments; Role Model Days; Grants for research on gender studies	Gender mainstreaming of the National Development Plan; Exploring Masculinities; Gender Matters
<b>Lithuania</b>	Law on Equal Opportunities of the Republic of Lithuania, 1998	Parental leave	National Program for Equal Opportunities for Women and Men (2003-2004)
<b>Spain</b>	Spanish Constitution, 1978 (art. 1.1; art. 9.2; art. 14; art. 23.2; art. 35.1); Workers Charter (art. 17; art. 28); General Law of Social Security (art. 7)	4th Plan on Equal Opportunities; Grants for research on women's studies; Resources for women's adult education; Women's Institute e-learning programme; Programme for the reconciliation of work and family Life; Tax deduction for maternity; Clara	Campaign for non-sexist play (Andalusia); Permisos parentales; Elige (Andalusia)
<b>Sweden</b>	Equal Opportunities Act, 1980; The Equal Treatment of Students in Universities Act, 2002	Women in Academia; Women in Science and Technology	4R method; Gender mainstreaming strategy; Integrating a gender equality perspective in health, medical and social services; Information society for all

<b>UK</b>	Equal Pay Act, 1970; Sex Discrimination Act, 1975	Promoting science and technology for women; Raising Boys' Achievement Project; National Childcare Strategy	Paternity leave; Flexible work; Equality strategy (Scotland); Mainstreaming equality in legislation (Scotland); Integrating gender into all policies; EOC Campaign against sex stereotyping
<b>EU</b>	Council Directive 75/117/EEC; Council Directive 76/207/EEC; Council Directive 79/7/EEC; Council Directive 86/378/EEC; Council Directive 86/613/EEC	Third, Fourth and Fifth Community Action Programme For Equal Opportunities; NOW	Commission Communication (COM(96) 67final); Guide to Gender Impact Assessment; Gender Mainstreaming in Structural Funds Gender Mainstreaming the Employment Action Plans; Gender Mainstreaming the National Action Plans for Poverty and Social Inclusion

### 3.2.1.2 Positive Action

This approach too is to be found in all the country cases as well as the EU (see Table 2).

The following are the most noteworthy analytic points about positive action:

- In the main this approach leads to the introduction of projects and programmes rather than legislation (although it has led to legislation on maternity in some cases).
- There is variation across countries in the degree to which a positive action approach prevails. The countries where a positive action approach is most influential are Spain and France and, to a lesser and more recent extent, Greece and Ireland.
- There is variation also in the degree to which an integrated approach is taken to positive action. Spain is an exemplar in the treatment of positive action measures in an integrated manner. It has, for example, an extensive institutional framework (i.e., women's machineries at all government levels) and national, regional and local plans on equal opportunities for women and men which contain detailed positive action measures. Spain, therefore, offers an interesting case study of positive action in practice, its advantages and shortcomings. Other countries have also set up integrated positive action programmes but on a smaller scale. Both Ireland and Belgium have recently introduced integrated positive action programmes aimed at tackling socio-economic disadvantage among women. In the other countries, positive action interventions tend to be more isolated, limited to individual programmes or projects rather than being part of an overall strategy.
- There is variation also in the timing or periodisation of the positive action approach. For example, Ireland and Greece have only recently introduced projects which adopt a positive action approach whereas in other countries this approach is more established in the national gender policy configuration.
- It is important to point out the leading role of the EU here in that most of the measures are co-funded which, among other things, means that the European Social Fund has played a major role in promoting the positive action approach. Most of the projects funded by such programmes are focused on education, training, confidence-building, reconciling work and family life and enhancing the role of women in decision-making. In recent years, programmes have become more diversified, seeking to change the image of women portrayed in the media, to encourage a more equal division of labour within the household and to improve representation of women in all spheres of decision making in political, professional and public arenas

By way of summary, the evidence suggests that a positive action approach is important for this study in that it is quite influential within the countries included in the study. That said however, it should be noted that the approach tends to be applied in some policy domains rather than others – such as employment, education and training, social protection – and to be stronger in some countries as against others.

### 3.2.1.3 Gender Mainstreaming

Identifying gender-mainstreaming approaches in policy is not an easy task. This is because, in contrast to both of the other approaches, the adoption of a gender mainstreaming approach cannot be identified by looking at legislation or specific, separate, policies for women overseen by women's equality bodies. Rather, its adoption is to be found by examining general policy content, processes and institutions. Yet, it is possible to draw tentative conclusions on the basis of Deliverable 2, especially about the existence and nature of gender mainstreaming measures in the eight countries. Table 2 lists these.

The following are the main points worthy of note about gender mainstreaming:

- There is great variation in the measures and actions taken in order to implement gender mainstreaming. Relevant measures include: the establishment of gender mainstreaming co-ordinating bodies (Belgium, France, Sweden, UK); an enhanced role for consultation and participation (Scotland); the establishment of gender equality targets across government departments (Sweden and UK); the dissemination of a set of gender mainstreaming guidelines to different levels of government and other institutions involved in policy making (Ireland, Sweden, UK); and gender proofing of budgets (Belgium, Scotland, Sweden), among others.
- It should also be noted that in some countries mainstreaming gender is part of a larger process of mainstreaming equality. This is true for Ireland and Scotland and, in the future, the entire UK. This is relevant for the empirical research in that it might make for variation between these countries and others where gender mainstreaming stands alone.
- All member states, and hence all countries in this study apart from Lithuania, have had to adopt gender mainstreaming measures by virtue of their membership of the EU. This means that they have been required to gender mainstream projects funded under the Structural Funds, the National Employment Action Plans and the National Action Plans on Poverty and Social Inclusion. Countries in the study vary, therefore, not so much in whether they have met the minimum requirements but how far beyond these they have gone.
- Of all the eight countries, the gender mainstreaming approach is most dominant in Swedish gender equality policy where a wide-ranging institutional architecture and a comprehensive set of methods and procedures aimed at the incorporation of a gender equality perspective into all aspects of policy and practice is well established. Sweden is therefore an interesting case study of this policy approach. Gender mainstreaming also seems to be developing quite strongly in the devolved regional governments of Belgium and the UK.

By way of overview, gender mainstreaming is the most recent of all the approaches and is generally at a much earlier stage of development to the point where some countries have not even reached the stage of implementation. One of the main lessons to be drawn from this initial survey of policies is that the adoption of a gender mainstreaming approach can take different forms. As a number of experts have pointed out (Rees 1998; Verloo 2001; Booth & Bennett 2002), the gender mainstreaming approach is informed by a new feminist perspective on gender equality, but how this new perspective is incorporated into policy and policy making

is something that is not fixed. In order to achieve its goals, the approach usually involves the introduction of a number of new policy techniques and procedures.

We now turn to the two policy domains that are the specific focus of this research.

### ***3.2.2 Gender in the Policy Domains of Social Protection and Education***

These two policy domains, together with employment policy, have seen considerable gender-relevant activity, in particular the equal treatment and positive action approaches. Table 3 lists the relevant measures, programmes or initiatives identified by the Deliverable 2 reports.

#### ***3.2.2.1 Gender Sensitive and Women Friendly Policies in the Field of Education***

From our survey of education policies in the countries under study, the following points are noteworthy:

- On the basis of the evidence, all three approaches to equality have been applied to the domain of education policy, although positive action is the predominant approach.
- As far as is known, the principle of equal treatment in education is enshrined in the legislation in all countries. In some countries, especially Sweden, equality legislation in education is relatively recent.
- Policies or measures oriented to a positive action approach are mainly concerned with the promotion of science, engineering and technology among women (France, Ireland, Spain, UK), the development of research on women and gender issues (France, Ireland, Spain, UK) and improving the position of women in academia (Belgium, Lithuania, Sweden). Looking across countries though, the two areas which have received most attention are women in science and technology and women in academia.
- On the basis of the evidence available to us at this stage from Deliverable 2, not all of the country cases have introduced gender mainstreaming initiatives in the educational domain and, and in those where mainstreaming has been introduced, the initiatives are quite varied. Relevant initiatives on mainstreaming include policies aimed at tackling gender stereotyping (France, Lithuania, Spain, Sweden), the creation of new policy structures, such as the establishment of dedicated gender units within education departments (Ireland), or the introduction of integrated programmes affecting a wide range of educational areas such as adult education, gender stereotyping, women in science and technology and women in academia (Greece).
- The scarcity of gender-sensitive or women-friendly policies in the area of the information society (found only in Spain and Sweden) and adult education (found only in Spain) is also to be noted.

**Table 3 Relevant Policies, Measures or Actions in the Fields of Education and Social Protection**

	<b>Education</b>	<b>Social Protection</b>
<b>Belgium</b>	Gender mainstreaming in universities (Flemish community) Stabilisation of women's research careers in academia (French speaking community)	Paternity leave Parental leave Time credit Tax deduction for childcare expenses Tax reform Tax credit Pension reform
<b>France</b>	Promoting equality in the education system Taskforce on parity in science and technology Career desegregation campaign The Scientific and Technical Vocation for Girls Prize	Integrated child benefits Development of childcare supply Employment bonus Paternity leave Pension reform in the public sector
<b>Greece</b>	Reforming curricula Improvement of access of women to the labour market. Programmes for the support of women studies and the support of women during undergraduate and postgraduate studies and for female researchers.	Pension policy EQUAL Operational programme: renovation, upgrading, building and equipping of child and elderly care facilities Regional operational programme: childcare
<b>Ireland</b>	Role Model Days Gender Matters Changing Gender Stereotypes Exploring Masculinities	National Anti-Poverty Strategy Equal Opportunities Childcare Programme; Family friendly policy in the civil service Individualisation of social assistance payments
<b>Lithuania</b>	Equal opportunity in academia	The desegregation of the labour market and valuing women's work Wage policy Maternity and parental leave Equal treatment for self-employed workers and their assisting spouses
<b>Spain</b>	Grants for research on women's studies Resources for women's adult education Women's Institute e-learning programme ELIGE (Andalusia) Campaign for non-sexist play (Andalusia)	CLARA Parental leave rights Programme of reconciliation of work and family life Tax deduction for maternity

	<b>Education</b>	<b>Social Protection</b>
<b>Sweden</b>	Women in academia Women in science and technology Information society for all	Equal pay Integrating a gender equality perspective into health, medical and social services
<b>UK</b>	Promoting science engineering and technology for women Raising boys' achievement project	Paternity leave Flexible working National Childcare Strategy

### 3.2.2.2 Gender Sensitive and Women Friendly Policies in the Field of Social Protection

From our survey of how gender concerns have been developed in social protection reforms in the countries under study, the following points are noteworthy:

- In comparison to education, social protection has seen much less activity around gender. For example, it is only recently that some countries have seen initiatives aimed at equalising the rights of women and men in relation to social security entitlements (e.g., equalising the age of access to pension entitlements in Belgium and Greece). This is another notable difference as compared with the educational domain which saw the equalisation of rights as far back as the 1970s.
- Most initiatives in this domain take a positive action approach and fall within the areas of reconciliation of work and family life (see Table 3). However, since such programmes or measures can also be introduced for other than gender objectives, it is important to establish whether in the national setting these policies have a gender-specific objective.
- The recent introduction of some form of paid paternity leave in most countries (with the notable exception of Ireland) points towards a shift in policy focus from women to gender. Paternity leave, however, does not fit easily with one particular policy approach to equality. The reason for this is that, while it incorporates important aspects of the gender mainstreaming approach (e.g., a focus on men's share of responsibilities in the domestic sphere), it also incorporates aspects of the equal treatment approach (e.g., equalising the right to leave between women and men).
- There is no evidence of changes in policy-making processes or structures within the social protection domain. Sweden is the exceptional case in this regard though, emphasising the introduction of a gender perspective in all social protection benefits and services.

In conclusion, there is an asymmetry between education and social protection whereby the former has not only seen much more activity than the latter but also is characterised by an evolution of policy in relation to gender over time.

### **3.3 Overview and Implications for Study**

Comparing the ideal type models with policy practice in the eight countries, the following are the most significant points for the design of the research:

- The three models are not separable in practice but are intertwined and build upon and interact with one another as approaches to the problem of gender inequality. One implication of this is that one cannot study gender mainstreaming in isolation because it is in all countries grounded in an existing history of gender equality measures. In addition, one must be sensitive to the history of measures aimed at combating gender inequality and to how these have developed in the national setting.
- All three models are evolving. Hence it is incorrect either to periodise one model to a particular point in time only or to 'fix' the model or approach by assuming that it can take only one form. For example, equal treatment as it is being implemented today is quite different to how it was conceived in the 1970s in that it is now used in a transversal way rather than being confined mainly to matters of employment. The Irish case is a clear example of a new approach to equal treatment whereby equal treatment is legislated for in relation to access to a whole range of public services and amenities. Positive action as an approach has evolved as well, not least in that it covers men as a target group (and indeed sometimes nowadays only men).
- There are some measures or policies in place that draw on a variety of approaches or models and so attributing them to one rather than another approach is difficult and may be erroneous. One way of responding to this and also the other points made above is to maintain a certain degree of openness about the models and how policies are to be classified.
- There is a large asymmetry within and across countries in terms of the degree to which education and social protection have been the focus of gender equality measures. The educational domain has seen much more relevant activity than social protection. Social protection has been much less often a focus of gender equality measures and the actions taken have generally been confined to two objectives: to rid systems of discrimination against women and, more recently, to reframe social protection so that it is more in line with the general policy objective of reconciling work and family life. The educational domain also shows a greater evolution or progression of policies, to be seen, for example, in a move from women to gender, a focus on structural (or access) problems, a focus on educating policy makers and practitioners about their practice, the creation of dedicated units or personnel and the introduction of integrated programmes that cover different areas like women in academia, sex stereotyping, women in science and technology. One implication of this for the current research is that, on the basis of the available information, the education domain offers more options for the selection of the particular policies to be studied than does social protection. This will be discussed further in section 5 below.

#### **4. THE STUDY OF POLICY AND THE RELATIONSHIP BETWEEN GENDER AND QUALITY IN POLICY**

Two issues are central here: how we understand and study public policy and how we conceive of quality in policy making.

#### 4.1 Approach to the Study of Policy Making

Many approaches and theories of policy development and change have been developed since the introduction of public policy analysis in the 1960s.<sup>1</sup> All have significant shortcomings when used on their own (John 1998). However, two approaches have been developed in recent years that are considered to be more comprehensive: the policy advocacy coalition framework developed by Sabatier (1988; 1991) and the policy streams approach developed by Kingdon (1984). Both approaches, which share many common features, are integrative, overcoming the limitations of the single explanatory models by proposing multi-dimensional frameworks that seek to encompass the complexity and changeability of the policy process. Moreover, their frequent application in recent feminist policy analysis, as noted by Mazur (2002, p.12), indicates their usefulness for understanding gender in public policy of modern welfare states.

The policy advocacy coalition (PAC) framework regards policy making as a continual process with no strict beginning and end, the content of which is influenced by changing coalitions of ideas and interests (involving bureaucrats, politicians, interest-group representatives, researchers, policy analysts and journalists). The idea is that two to four competing policy advocacy coalitions, each with its own ideas about policy content, compete for dominance in a subsystem, and that policy making (in terms of agenda-setting and other phases) is dominated by elite opinion. Knowledge plays a crucial role because the coalition is a reflection of the ideas and interests about a set of policy issues. The analysis is thus not only about actors and networks, but also about values and conceptions. Institutions play a key role through the salience of levels of government and the interaction of government agencies and committees. Key to the framework are the assumptions that actors learn over time and that ideas are stable unless they are disrupted by a major crisis. Rapid change in the external world (especially social and economic factors and the advocacy of new solutions to policy problems) can disrupt previously stable patterns of interests and exchanges. Thus the interaction between external changes and domestic ideas and interests is seen by users of the PAC framework as a key factor in explaining policy change. As John (1998) suggests, the PAC framework is a useful way of analysing policy at European level, which is characterised by fluidity of networks and an importance of new ideas in shaping policy. However, he also points out that one of the main assumptions made in the PAC framework - that the policy process is relatively stable unless disrupted by external change - may not be true. A further weakness is its relative neglect of institutions and individual choices.

The policy streams approach developed by Kingdon (1984) has also been argued to be appropriate for the EU policy arena (Richardson 1996). Similar to the PAC framework, it recognises the relative importance of ideas, institutions and external processes, but places more emphasis on individual agents and assumes continual policy change. Policy solutions, in this approach, can come from 'anywhere' (not just as a result of external stimulus). Ideas are not uniquely associated with one person or individual but arise from the sharing of agendas between decision makers. Kingdon regards policy formation as a result of a flow of three sets of processes or streams: problems, policies and politics. Problems are public matters requiring attention.

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<sup>1</sup> These include institutional approaches, group and network approaches, socio-economic approaches, rational choice theory, and ideas-based approaches.

Policies are proposals for change based on the accumulation of knowledge and development of interest among the specialists in a policy sector. Certain highly motivated people, the policy entrepreneurs, propose solutions to policy problems. Policy entrepreneurs mobilise opinion and institutions and try to ensure that the idea does not drop off the agenda. They can be politicians, bureaucrats, policy analysts, researchers, consultants or journalists. Thirdly, political processes, such as election results or swings in public mood, influence how the media and other opinion formers define public problems and evaluate the potential solutions.

Also important to the policy streams approach is the argument that agendas are not an automatic reflection of the power of the participants in the policy process. An idea often 'catches on' and moves rapidly onto the political agenda, especially when there is what Kingdon calls a 'policy window', which is an opportunity – such as a new policy problem or a new administration – for policy advocates to press home their ideas. Because of boredom, symbolic political actions and the natural course of the issue attention cycle, the windows often close as rapidly as they open. The 'opening' of a window for advancing gender equality, and how it is used (or missed) as an opportunity by gender equality advocates, is just one of the interesting questions raised by the PAC and policy streams approaches for the research study. While the policy streams approach appears to have considerable merits, it focuses primarily on policy making and has much less to say about policy implementation.

Drawing on the strengths of these approaches, it is proposed that the framework to be used by the research study in analysing the policy process will pay attention to:

- Actors (individuals, coalitions, networks);
- Knowledge (ideas, values, conceptions) concerning problems and solutions;
- Institutions;
- Political processes;
- Social and economic change.

A dominant feature of recent literature on public policy analysis is the questioning of the earlier view that policy making is a rational process that follows a life cycle composed of neat steps or phases (Lindblom and Woodhouse 1993; Sabatier and Jenkins-Smith 1993). The idea of dividing up policy making in such a way, they argue, greatly overstates the rational nature of policy making and gives a false picture of a process in which agenda-setting takes place at one end of the line and implementation and evaluation occurs at the other. While acknowledging these criticisms, Parsons (1995) notes that there is, nonetheless, a need to reduce the complexity of policy making to a manageable form, so that analysis can be undertaken and understanding gained.

Various ways of classifying the phases of policy making have been proposed, varying from a simple three-stage model of intelligence, design and choice (Simon 1957) to the twelve-stage model proposed by Rose (1973). For this research study, it is proposed to adapt the three-stage model proposed by Parsons (1995) as our framework for analysing different types of policy-making activities, recognising that the phases may or may not proceed in chronological order. This model has the advantage of relative simplicity, while incorporating the wide variety of types of policy-making activity that occur in real life.

The three-phase model to be used for assessing policies in the research study is as follows:

- The first phase – which we shall call agenda-setting - is the way in which issues and problems are defined and policy agendas are set. In terms of policy-making activities, this encompasses problem recognition, defining issues, formulating alternatives, public recognition, advancing demands, among others.
- The second phase - decision-making - concerns how decisions are taken and how information and analysis are used within the decision-making process.
- The third phase - delivery - concerns how policies are administered, managed, implemented, evaluated and terminated.

The extent to which the study will examine all three policy phases depends partly on the stage and timescale of the policies selected for study. Given that the explicit integration of gender into public policies is relatively recent, and that the research aims to study the policy process in real time, the main focus will be on the first two phases, agenda-setting and decision-making. This is an important factor in selecting the analytical framework for study of the policy process. Moreover, as we shall see below, the first two phases emerge as the most important in ensuring policy quality, which is a major focus of the research.

As well as being interested in the general progress towards implementing gender mainstreaming, the study is also concerned to identify whether gender equality policy impacts on public policy making, especially in regard to improving its quality. How is quality to be conceived?

## **4.2 Quality in Policy**

The claim that gender mainstreaming is a newer and better strategy is quite widely found in both academic and non-academic literature. It has been said, for example, that gender mainstreaming is a ‘potentially revolutionary concept’ (Hafner-Burton & Pollack 2002, p. 342), a ‘potentially radical strategy’ and a ‘transformative strategy’ (Rees 1998 p. 46). Similar claims about the merits of gender mainstreaming are to be found in the policy literature (e.g. the Council of Europe (1998) report). However, as Verloo (2001) points out, these claims need to be substantiated if they are going to be more than mere rhetoric. Essentially this brings us to the realm of assessing the relationship between the approach taken to gender and the quality of policy making.

Two threads of debate are to be found in the international literature on policy quality. On the one hand, there is attention to good governance, which is focused on bringing about greater transparency, accountability and regulatory control (Barro 1996; Isham, Kaufmann and Pritchett 1997; Kaufmann, Kraay and Zoido-Lobaton 1999). There is also another body of relevant literature, that on good public policy, which identifies criteria for policy quality (Curtain 2000; Ministry of Justice Sweden 2000; UK Cabinet Office 2001; APPRN 2002). Critical issues identified relate on the one hand to the ‘distance’ between the citizen and the policy makers and on the other to the actual practice of policy itself. Taken together these literatures are helpful in suggesting what we might think of as ‘quality’ in public policy making.

The first set of issues concerns who the policy actors are and how widely the policy process extends. As regards actors, the two criteria of quality that emerge strongly from the literature are the involvement of stakeholders outside the public service and

government (providing them with access to research and documents, involving them in policy dialogue, and so forth) and collaboration between agencies and other players in society. Knowledge and information are also identified as criteria of quality, with an equal emphasis on evidence-based policy making and the taking into account of values, concerns and interests. The following are the main quality considerations in relation to the use of information that are identified in the literature:

- Starting with a comprehensive understanding of the current environment and defining what society's needs are;
- Ensuring that policies are inclusive and take full account of the needs and experiences of all those likely to be affected by them (individuals or groups, families, businesses or community organisations);
- Responding to public concerns and needs through values and pragmatism, and communication of clear priorities;
- Basing policy on a widely shared and understood vision;
- Making use of available evidence, in particular drawing on multiple sources of evidence. This includes evidence on solutions (what works and what does not work), and using analytical techniques to understand problems and assess solutions.

Concerning the quality of institutions, Tanzi (1999) identifies a number of factors that are relevant to the quality of the performance of public institutions: tradition and reputation; the resources they have available; the clarity of their mandate; their organisation; the incentives they face; and the quality of their leadership and staff. In terms of what constitutes quality in policy institutions, the literature suggests that they should be transparent, accessible and obliging, provide information to citizens and give them equal opportunities for dialogue and for expressing their views. Political processes are also referred to in the literature, which suggests that many political processes produce 'bad' policy. Good public policy takes account of the political, economic and legal constraints on the policy making process, and involves long-range thinking in tune with the longer-term process of policy change (thus avoiding the limitations of short-term politically-motivated decision making).

Concerning the policy delivery phase, a number of recommendations are made for good policy delivery, including: the definition of performance targets and indicators (management by results) and benchmarking; intensive support and training for managers and front-line staff; sufficient freedom for those on the ground to innovate and adapt policy to local conditions; clear leadership; effective management of complex technologies; clear lines of accountability; quick learning; skills development of public servants and attention to diversity; and ensuring that the 'silo effect' of departments operating independently of each other is minimised. The emphasis on quick learning requires timely and appropriate monitoring and evaluation. Here too the theme of stakeholder participation is noted, with the suggestion that stakeholders and users should be involved in the measurement and evaluation of performance.

In section 5.1 below, we will draw on these criteria on good public policy to develop indicators to scrutinise the relationship between gender equality policy and the quality of public policy.

## **5. THE DESIGN OF THE RESEARCH**

This section presents the research design. It outlines how the study's three objectives are to be realised, discussing in turn the operationalisation of the key research questions, the selection of the policy reforms to be studied in each national case and the methodology of the research.

To reiterate the study's key objectives, they are to:

- Investigate how gender equality policy is proceeding;
- Identify if gender equality policy affects the quality of policy making;
- Compare and contrast the national cases to each other and to the EU;
- Identify and assess good practice in women-friendly and gender-sensitive policy-making.

We will now discuss how these are to be achieved.

### **5.1 Operationalisation of the Key Questions**

#### ***5.1.1 Measuring Progress in Implementing Gender Equality Policy***

The analysis undertaken to date has underlined a number of points pertinent to how we study progress in implementing gender equality policy. It has shown, first, that it is important to retain and ascertain views on the concepts of both gender equality and gender inequality. In addition, it has been emphasised that it is important to ascertain the problematic in relation to gender equality/inequality which underlies the policy reforms to be studied. The analysis undertaken to date, and especially that undertaken in section 3, also suggests the need to investigate not just the progress towards gender mainstreaming but also the extent to which the equal treatment and positive action approaches are to be found in the national policy configuration. In any case, it was also made clear that the three approaches are intertwined and inter-related in practice. In all of this we intend to be informed by the work of Bacchi (1999) who has set out a framework which prioritises and suggests a method for the investigation of the gender problematic as it informs and is embodied in policy. This is elaborated further in section 5.3.3 below which discusses how the information is to be analysed.

In terms of our approach to policy which was elaborated in section 4, we reiterate here that we are conceiving of policy in three stages - agenda-setting, decision making and delivery – and that we see the policy constellation in a broad manner to consist of actors, ideas/knowledge, institutions, political processes and socio-economic context.

By way of summary therefore, we can say that we propose to achieve the first research objective on progress in implementing gender equality policy by investigating the meaning given to gender equality and inequality, the procedures put in place to realise it, the barriers that have been encountered and the degree of change that is seen to have been brought about. In relation to gender mainstreaming in particular, which typically involves changes in policy making procedures, we intend to examine such issues as the extent of progress made in introducing disaggregation of statistics, gender training for policy makers and key actors, gender impact assessment and gender-proofing and monitoring and evaluation.

In relation to the two policy domains of education and social protection, the empirical research exercise will be organised so as to provide answers to the following key questions:

- What understanding do the key actors have of gender equality and inequality in the country/policy domain? How is the gender problematic perceived by the actors?
- In the understanding of the key actors what are the links between the EU approach and the national approach? How has the EU informed the national approach?
- What is the reaction to the EU view of/discourse on gender equality at national level? To what extent is it a different philosophy to that prevailing at national level?
- What are the planned outputs of gender equality policy? How is gender inequality to be tackled and gender equality to be achieved? Are there targets?
- What is the dominant approach to gender equality in the country/policy domain?
- Is there more than one approach being followed and if so how are they related? Is gender mainstreaming the dominant approach to gender equality in the policy domain? Is there a balance or complementarity between different approaches?
- What are the procedures put in place to realise gender equality?
- Who are the key actors in terms of decision makers and implementing agents?
- How widespread are the procedures for gender equality - do they cover existing and new policies or programmes, legislation, budgets?
- What structural changes if any have been made, both in the policy process and also the policy itself?
- To what extent is there promotion of research on women and gender issues?
- To what extent is gender mainstreaming being progressed by changing the proportion of women in senior management positions in government departments/relevant state agencies?
- To what extent is there monitoring and evaluation?
- What barriers are identifiable/said to be being encountered in practice?

### ***5.1.2 Assessing the Relationship between Gender and Policy Quality***

To operationalise this, the research will investigate the extent to which gender equality policy in general and mainstreaming in particular results in changes such as increasing participation of and collaboration between key actors and players, improving the evidence base of policy, making policies more sensitive to the needs of different sectors of the population and bringing about greater accessibility of policy-making institutions. These are treated as empirical as well as normative questions in that the participants in the policy process who will be the study's respondents will be asked to provide evidence of these effects in practice thereby supplementing the judgements of the researchers as to whether gender equality policy has led to some improvements in the quality of policy and of policy making.

In relation to the two policy domains of education and social protection, then, information will be obtained to enable the research project as a whole to answer the following key questions:

- Does gender equality policy increase the range of actors involved in the policy process, inside and outside the public service and government?

- Does gender equality policy improve collaboration between public agencies and other players in society, especially those representing women's and gender equality concerns?
- To what extent is the evidence-base of policy improved, for example as a result of the use of sex-disaggregated information and by taking into account the interests of women? Is the identification and analysis of problems and solutions improved?
- Has gender increased the influence of external stimuli on policy change and enlarged the range of solutions considered in national policy making?
- Are policies more inclusive because they take a fuller account of the needs and interests of different groups of women and men?
- Have the values and priorities underpinning policy changed as a result of taking into account women's views or the different views of women and men?
- Have policy-making institutions become more accessible to women and improved their attention to equal opportunities?
- Has gender contributed to improving the quality of public institutions dealing with gender issues (e.g. providing them with clearer mandates on policy making, more resources, better leadership)?
- Has gender helped to overcome the 'silo' effect of departments operating independently of each other, by facilitating inter-departmental or inter-agency working on this cross-cutting issue?
- Has gender contributed to the improved definition of policy outcomes, such as targets and indicators?

### ***5.1.3 Identification and Assessment of Good Practice***

The identification and assessment of good practice will emerge as the responses to the questions concerning progress in implementing gender equality policy and the relationship between gender and policy quality are analysed. Good practice in this sense refers to the lessons that can be drawn from the experiences of developing and applying gender equality policies, which can inform future policy making and the practice of gender mainstreaming. Questions concerning good practice are empirical as well as normative, in that the judgements of the researchers will be supplemented by evidence, drawn in particular from the policy actors themselves, of the links between particular approaches or methods of integrating gender equality in policy and their effects on policy in practice.

The research project will aim to answer the following key questions concerning good practice:

- Do particular approaches and methods for taking gender equality into account in public policies appear to produce better effects?
- Does the involvement of particular actors appear to produce better gender equality policy? If so, which actors and what forms of involvement are concerned?
- What are successful ways of overcoming the barriers to gender equality?

- What improvements to gender equality policy, and to the policy environment at EU and national levels, would help to progress the integration of gender equality into public policies?

## 5.2 Selection of Policies for Study

While it was decided from the outset that the focus of the study would be on the two domains of education and social protection policy, a decision needs to be made on which policy reforms will be studied within these two domains in each country. That is the subject matter of this section which first sets out the criteria which should guide the selection and then outlines the actual policies selected for study in each country. .

### 5.2.1 Criteria for Selection

In our view there are five main criteria which guide the selection of the policies that should be studied empirically. These criteria are:

- **Comparability** across countries (policies should exist in most if not all countries and be ‘researchable’ across countries);
- **Centrality to the research** problematic/design (the policy selected should provide a fruitful focus of study in order to answer the key research questions);
- **Centrality of policy/measure to understanding the national situation** (the policy selected should be revealing about the national policy constellation);
- **Specific targeting of gender equality** (the policy must be oriented specifically to gender);
- **Contain a processual element** (policies must be ‘live’, that is, in an active and preferably early phase, it should be possible to observe or enquire into developments over time and the policy in question should require more than a single act of implementation).

### 5.2.2 Proceeding to Select National-level Policies

On the basis of Deliverable 2, it seems that most countries are undertaking gender-related reforms in their educational policy. The most common objects of reform across countries are the following: gender stereotyping; the presence of women in science, engineering and technology; the presence of women in academia; and research on women/gender. When we evaluate each of these against the five criteria set out above, the most pertinent reform measure is gender stereotyping (Table 4). While this does not meet all of the criteria – especially because such reforms are not currently underway in all of the eight countries – it does meet four of them and it is the only reform to do so. It should be emphasised at this stage that gender stereotyping is defined in a broad way, encompassing not just measures to alter how gender is represented in textbooks and other educational materials but including also measures relating to teacher training and subject choice. In addition, the study of this policy area will cover all four levels of education, from pre-school to third level.

**Table 4 Main Education-relevant Reforms Across Countries According to the Selection Criteria**

	Comparability across countries	Centrality to research question	Centrality to national policy	Specific targeting of gender equality objectives	Processual element
Gender stereotyping	-	+	+	+	+/-
Women in science and technology	+	-	+	-	+/-
Women in academia	+	-	-	+	+/-
Promotion of research on women and gender studies	+	+	-	+	-

+ meets the criterion; - does not meet criterion; +/- mixed, depends on the country case.

Turning to social protection, as pointed out earlier it has seen less gender-related reform than is true of education policy. Hence as Table 5 shows there are fewer reforms to choose from in social protection as compared with education. In addition, those reforms that are underway meet fewer of the selection criteria.

**Table 5 Main Social Protection-relevant Reforms Across Countries According to the Selection Criteria**

	Comparability across countries	Centrality to research question	Centrality to national policy	Specific targeting of gender equality objectives	Processual element
Childcare	+	-	+	+/-	+/-
Reconciling work and family life (parental/paternity leave; flexible work)	+	-	+	+/-	+/-
Income redistribution between women and men (tax and social insurance reform – incl. Pensions)	-	+	+	+	+

+ meets the criterion; - does not meet criterion; +/- mixed, depends on the country case.

Clearly, none of the reforms underway in social protection is ideal for the present study. Of the available reforms, those relating to income redistribution (as effected by taxation and social insurance reform) meet more of the criteria than either childcare or reforms oriented to the reconciliation of work and family life. In addition, income redistribution related reforms have the particular advantage in the context of the others available that they are central to the study's area of interest and go to the heart of the national gender policy.

Having evaluated the reforms according to the criteria for selection, gender stereotyping in the domain of education and income redistribution between women and men in the domain of social protection are the reforms that are most appropriate for study. However, not all the eight countries are engaging in reforms on gender stereotyping or income redistribution. In particular Belgium, France, Ireland, Spain and the UK are not at the current time engaging in one or both of these types of reform. Hence in these countries we need to select an alternative set of measures. What should these measures be?

Deliverable 2 indicated that these are all countries that have recently introduced policy programmes, plans or strategies which contain a wide range of integrated measures aimed at incorporating gender mainstreaming principles into both policies and policy-making processes. We are speaking here in all cases of transversal policies. They are also designed to advance a gender mainstreaming approach to policy which means among other things that they aim at changing the policy-making process. Given this, they are especially pertinent to the study, allowing us to investigate the relationship between gender mainstreaming and an improvement in the quality of policy.

Table 6 lists the policy reforms that will be studied in each country. Appendix One briefly describes the focus of each of the policies that will be studied empirically for each country. We can point out by way of summary that the universe of policies to be studied allows us on the one hand to compare progress in implementing particular reform measures (e.g. gender stereotyping) within and across a number of countries while on the other providing country case studies of transversal or generic approaches to reform.

**Table 6 Policies to be Studied by Country and Domain**

Country	Education	Social Protection	Integrated measures
Belgium		Pension reform	Strategic Plan for Equality Affairs
France	Inter-Ministerial agreement on promoting equality in the educational system		Platform for the Integration of a Gender Perspective
Greece	EPEAEK II	Pension reform	
Ireland	Gender Equality Programme of the Equality Unit at the Department of Education and Science		Gender mainstreaming of the National Development Plan
Lithuania	Measures aimed at combating gender stereotyping in education included the National Programme for Equal Opportunities	Social insurance policy for the self-employed	
Spain	Measures aimed at combating gender stereotyping in education included in the Fourth Plan for Equal Opportunities between Women and Men.		Integrating a gender perspective in all policies as specified in the Fourth Plan for Equal Opportunities between Women and Men
Sweden	Measures aimed at combating gender stereotyping in education included in the governmental strategy to integrate gender equality into all policies	The integration of a gender dimension within health, medical and social services	
United Kingdom	Equal Opportunities Commission activities against gender stereotyping in education  Integrating a gender perspective within the National Curriculum of Wales		Integrating a gender perspective in all policies as specified in the objectives of the Women and Equality Unit

### **5.2.3 The Selection of EU and International Policies**

While the main focus of the research is on public policies in the eight study countries, the research also draws on two other policy dimensions. Firstly, and most importantly, there is an interest in EU policy, and in the interplay between EU and national policies, especially the influence – or not – of EU policy on national policy processes in the eight study countries. Secondly, since the study aims to identify and assess good practice in gender equality policy, it is considered that extending the range of experiences available can enrich this analysis. Hence we propose to include evidence of national policies in other EU and international countries that have made the most advances in gender mainstreaming.

Concerning EU policy, the policies to be studied are those that parallel the national policies selected.<sup>2</sup> The policies to be studied therefore include:

- EU policies on gender equality and gender mainstreaming, including legislation, directives and communications;
- EU policies on gender equality in education;
- EU policies on gender equality in social protection.

Concerning national gender equality policies from countries that have made considerable strides in gender mainstreaming, it is proposed to study the following policies:

- In the field of education: the Gender Impact Assessment of national education policy in the Netherlands;
- In the field of social protection: the treatment of gender in social support and tax system, including pensions, in Canada;
- Concerning integrated measures: the Canadian Federal Plan on Gender Equality and Gender Analysis process, instrument and resources; and from New Zealand, Gender Analysis and Gender Implications Statement.

## **5.3 Methodology**

Here we outline in turn the general methodological approach, the approach to data collection and the approach to be followed in analysing and interpreting the data.

### **5.3.1 General Methodological Approach**

This study is qualitative in nature. Qualitative research has a number of hallmark traits (Hammersley 1992, pp. 160-72).<sup>3</sup> First, the focus is on meanings that document the

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<sup>2</sup> EQUAPOL Deliverable 1 included a summary of EU policies on gender equality and gender mainstreaming and of the treatment of gender equality in EU policies on education, women and science and social policies concerning income distribution.

<sup>3</sup> Qualitative research has its theoretical roots in the symbolic interactionist tradition on the one hand and in phenomenology on the other. Symbolic interactionism goes back to the Chicago School and the pragmatists (Dewey 1930; Mead 1934) but its main exponent has been Blumer who states that “symbolic interactionism sees meanings as social products formed through activities of people interacting” (1969, p. 5). The phenomenological tradition also (Berger and Luckmann 1967; Schultz 1967) is fundamental to qualitative research as it explores in philosophical depth the processes and the constitution of meaning in society.

world from the point of view of the study’s participants. Second, data come in the form of words and images rather than numbers. Third, these data are naturally occurring rather than the result of artificial experiments. Fourth, induction is used to generate theoretical statements in that the meanings inherent in the data form the basis of empirical generalisation and theoretical statement. Qualitative research therefore spells a general approach to the study of phenomena, an interest in a particular type of data as well as a particular way of using the information generated to draw conclusions. The central objective of the present study will be seen to be qualitative in that it is to examine and evaluate policy processes, and where possible policy cycles, concerning gender inequality and gender mainstreaming. The data to be generated will include policy documents and other relevant texts, data arising from in-depth interviewing with policy makers, functionaries and other related persons and data arising from observation. It is particularly important in our research to explore whether gender sensitive policies are hampered or not by prevailing meaning structures and configurations. Hence, the data will be interpreted qualitatively, that is in terms of the structure of meanings, the constitution of meaning and the transformation of meanings. This will be outlined further in section 5.3.3. below. Our view of policy is also sensitive to a qualitative approach in that we treat policy not as a once-off rational set of action but as a process which needs to be contextualised and understood as involving a complex and continuous series of exchanges and interactions among actors, institutions and procedures.

### ***5.3.2 Methods for Gathering Data***

The methods for gathering data differ between the eight study countries and the EU and international levels.

A variety of methods will be used to gather empirical information at national level. The main three and their main application are summarised in the following table.

**Table 7 Methods for Gathering Data**

<b>Documentary analysis</b>	<ul style="list-style-type: none"> <li>- Legislative texts</li> <li>- Green and White papers</li> <li>- Departmental strategic plans and annual reports</li> <li>- Policy reviews</li> <li>- Policy guidelines and checklists</li> <li>- Budget reports</li> <li>- Transcripts of parliamentary sessions</li> <li>- Policy statements and submissions to government from relevant NGOs</li> <li>- Surveys and research studies in the context of policy formulation and design</li> <li>- Follow-up reports</li> </ul>
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<b>Interviews with policy actors and experts</b>	<ul style="list-style-type: none"> <li>- Policy staff in government departments and gender/women dedicated units with direct responsibility for the policies being studied</li> <li>- Members of parliamentary commissions dedicated to gender equality issues</li> <li>- Staff with direct responsibility for gender issues in main political parties and trade unions</li> <li>- Relevant NGOs</li> <li>- Senior researchers in: government departments, gender/women dedicated units, research institutes, independent equality bodies and universities</li> </ul>
<b>Observation of policy process</b>	Participation in: conferences, seminars, forums and workshops taking place during the process of policy formulation, design, implementation and evaluation.

Since the policy process of the EU and other national policies cannot be studied ‘in real time’, and the purposes of these comparisons are specific and different from the main study of national policies in the eight countries, the main method for gathering relevant data will be documentary analysis. This may be supplemented, wherever possible and relevant, by interviews with policy staff in the institutions responsible for the policies, senior researchers and relevant NGOs.

### ***5.3.3 Approach to Analysing the Data***

As outlined in section 4.1, the study focuses principally on the first two phases of the policy process, agenda-setting and decision-making, and on five key variables (actors and networks; knowledge, ideas and values concerning problems and solutions; institutions; political processes; and social and economic change). Two methods have been chosen that together allow analysis of the content and process of the policies under study: content analysis and stakeholder analysis.

#### ***5.3.3.1 Content Analysis***

One of the main methods used to analyse the data will be content analysis. This mode of analysis has arisen mainly within the domain of linguistics and sociolinguistics but it has also been used extensively in sociology, cognitive psychology and other disciplines. The identification of discourse is central to it. Analysing media texts, David Altheide (1996, p.31) has defined discourse as “the parameters of relevant meaning that one uses to talk about things”. We understand discourse in a broad way, to include not only language but ideas, beliefs and values as well as actions (Skölderbeg and Alvesson 2000, p. 208). The key objective is, through the identification of themes, to identify the approaches (in terms of meaning and actions taken) to gender equality that are to be found and how these are realised in practice.

The data will be analysed then to identify the themes and meanings that underlie gender equality for the purpose of policy making at national level. The work of Bacchi (1999) is helpful here. She suggests that a set of analytical exercises organised around the following questions will serve to ascertain which discourses and themes underlie policy proposals/debates:

- (a) What is the problem represented to be?
- (b) What presuppositions or assumptions underlie this representation?
- (c) What effects are produced by this representation? How are subjects constituted within it? What is likely to change and/or stay the same? Who is likely to benefit from the particular problem representation?
- (d) What is left unproblematic in this representation?

This will serve to identify the national approach (both discourse and action) to gender equality, i.e., the pattern of thought and action that is to be found in the policy making framework on gender equality in the specific domain. In the process we may consider ‘discursive or thematic shifts’ within the national approach and possible affinities with the three theoretical or ideal type approaches identified (equal opportunities, positive action, gender mainstreaming).

A further analytic task is to compare these to each other across countries and to the EU discourse. One possibility here is to, in exploring the concept of gender equality in the two domains of public policy, identify the interplay between multiple ‘discursive practices’ stemming from the national and EU levels. In particular, in each case study, through documentary analysis as well as semi-structured in-depth interviews with policy makers, we can explore the way current ‘EU discourse’ is interpreted at the national level and how the current EU discourse concerning gender equality (i.e., gender mainstreaming) is conciliated with the ‘general EU discourse’.

Furthermore, in order to identify the synergies between the EU and the national level, we will analyse: the meaning allocated to the EU discourse(s) and possible similarities or discrepancies between the national and the EU approaches. Such identification will tell us something about the unique modes by which each culture appropriates the desired concepts and takes action. The implications for the design (or implementation) of national policies that can be then analysed from the point of view of ‘discursive shifts and affinities’. We are especially interested in identifying factors acting to on the one hand further the receptivity at national level to the EU agenda and on the other hand as a hindrance or barrier to it.

### 5.3.3.2 Stakeholder Analysis

The other main method to be used for analysing the data is stakeholder analysis, which is derived from systems analysis and is widely used in political and management sciences and in feminist research (Burton & Dunn 1996). Stakeholders are defined as individuals or groups who have a stake in a policy because they affect or are affected by government decisions (Dunn 1994). As well as individuals, stakeholders can be government agencies or departments, elected leaders, political parties, trades unions, civil society groups, and so forth. Different stakeholders have different ‘constructs’ of reality and different discourses (Guba & Lincoln 1989).

Stakeholder analysis will allow the research to identify and assess the actors, networks and institutions producing particular discourses, as well as the dynamic interplay between discourse and stakeholders. As utilised in this research, stakeholder analysis will involve first identifying the various stakeholders concerned by a policy, and then assessing their role in the policy process. This role can be defined in terms of their influence on and importance to the policy process, which may change through the policy process.

## **APPENDIX ONE: OUTLINE OF THE POLICIES TO BE STUDIED IN EACH COUNTRY**

In **Belgium**, where there is no reform underway in the educational domain, the Strategic Plan for Equality Affairs and income redistribution are the two policies selected for further study. The Plan represents an important development in the integration of a gender perspective into all government policies in Belgium. In social protection, the most important reforms from a gender perspective relate to income redistribution between women and men. These include tax reform (2002-2006) which introduces neutrality towards personal lifestyle choices, and a pension reform which raises the retirement age for women from 60 to 65 years in order to equalise it with that of men.

In **France**, the two policies selected for further study are gender stereotyping in education and the platform for the integration of a gender perspective into all government departments. Addressing gender stereotyping is one of the main objectives of French education policy. Recent reform includes an inter-ministerial agreement to promote equality throughout the educational system. Within the framework of this agreement, several measures have been taken explicitly aimed at fighting sex stereotyping in education. The second reform to be studied in France is the integration of a gender perspective into all government policies. A partnership between different government agencies or departments has been created to develop a platform of concrete proposals and an inter-ministerial council on women's rights has been established.

In **Greece**, the policies selected are a number of measures included in the National Operational Programme for Education and Initial Vocational Training (EPEAEK II) and ongoing pension reform in the domain of income redistribution. The programme EPEAEK, which provides a framework within which Greek education policy is developed, can be considered as an innovative venture for Greece, since this is the first time that an explicit gender equality dimension has found its way into the philosophy of education policy. The study will focus on specific gender equality measures within the programme (in particular Axis 2/Measure 2.2, and Measures 4.1. and 4.2 within Axis 4) aimed at promoting gender equality at all levels of the education system by combating gender stereotyping in educational materials and practices and promoting awareness of gender issues. In the domain of social protection, income redistribution between women and men is the selected area to be studied, in particular pension policy as it is here that the most relevant developments are taking place. The government's strategy for pension reform incorporates a variety of measures aimed at integrating equality, including gender equality, in all pension rules.

In **Ireland**, in the educational domain the empirical research will focus on gender stereotyping in the context of the implementation of a wide-ranging gender equality programme which aims to incorporate a gender equality perspective into all aspects of the Irish education system. Since no relevant development in social protection reform has been identified for Ireland, this is one of the countries in which we have to find an

alternative. One of the main features of recent gender equality policy has been the introduction of both gender mainstreaming and positive action strategies within the framework of the National Development Plan 2000-2006. The research will focus on the process of implementing the gender mainstreaming principle within the framework of the Plan. In particular, the research will concentrate on the integration of a gender perspective into the delivery of projects concerned with the development of adult education and lifelong learning and family support services (funded under the Employment and Human Resources Development Operational Programme and the Regional Operational Programmes, respectively). The research will also focus on the activities of the Gender and Equality Unit, set up to provide advice to policy makers on the integration of a gender perspective into the development, implementation and evaluation of the Plan.

In **Lithuania**, in the education domain, the research will focus on those policies included in the National Programme for Equal Opportunities, which are specifically aimed at combating gender stereotyping in education. In relation to social protection, the research will study the implementation of an equal treatment perspective in social insurance policy for the self-employed, as regulated by Directive 86/613/EEC.

In **Spain**, the most significant development in gender equality policy in recent times has been the launch of the Fourth National Equality Plan Between Women and Men for the period 2003-2006. In relation to education, one of the objectives of the Plan is to combat gender stereotyping. In order to achieve this objective, a cluster of measures have been proposed; some of them specific to the field of education and others belonging to other domains (e.g., media). The research will study the process of implementation of those measures. Gender stereotyping policies in the education domain will also be studied in two regional autonomous communities, the Basque Country and Andalusia (each traditionally governed by a different party to that in central government). With respect to social protection, no explicit measures aiming at the redistribution of income between women and men could be found. However, the Fourth Plan contains measures aimed at mainstreaming gender in all areas of public policy. The research will study the associated implementation process.

In **Sweden**, the two policies selected for research are gender stereotyping in education and the integration of a gender dimension into all health, medical and social services. In relation to education, one of the objectives of the recent governmental strategy to integrate gender equality into all its policies (2002-2006) is to combat gender stereotyping in society. The empirical research will follow the process by which policies aimed at meeting this objective are implemented, in particular those belonging to the domain of education. In relation to social protection, the most interesting initiative is the plan to integrate a gender perspective into health, medical and social services during the period 2002-2004. The underlying policy objective is that every woman and man, regardless of age, socio-economic background and ethnicity, should have access to good quality care under the same conditions. This research will observe and study the process by which this initiative is being implemented.

In the **UK**, the main focus for the study of gender in education policy is gender stereotyping. The main agency promoting gender measures to combat gender stereotyping in the UK is the Equal Opportunities Commission (EOC). The relevant activities of the EOC in England, Scotland and Wales will form the subject of research. The UK is another country where there is no major reform underway in the area of income redistribution. Given this, we propose to study how the general objective of integrating a gender perspective into all areas of policy is proceeding. In particular, the research will focus on the strategies designed to meet the government's overall objective of bringing about measurable improvements in gender equality across a range of indicators by the year 2006. Such strategies include the introduction of measures and targets associated with that overall objective, as well as the introduction of new tools and techniques in the policy making process, such as gender analysis.

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