

Evaluation of Influence of Structural Funds Allocated to Lithuania for Years 2004-2006 on Promotion of Equality Between Women and Men

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Abstract

The article deals with the issue within the field of integrating equal opportunities into structural and cohesion policies by gender mainstreaming as a transversal dimension of social economic change in Lithuania. Attention is focused on the progress in gender equality by using 2004-2006 Structural Funds Operational Programs indicated in Single Programming Document and in meeting the provisions of the General Regulation on the EU Structural Funds. The study outlines to what extent the gender mainstreaming has been taken into account in the using of 2000-2006 Structural Funds programming and projects. Policy and strategy fields where progress has been made and fields where progress is still slow are highlighted. Major findings show that better results are achieved in improved women access to, and participation at all levels in, labour market, education and computer literacy training, rather than gender equality management at implementation level. The second aim was to develop recommendations for a more effective implementation of the gender equality and non-discrimination projecting in the 2007-2013 programming period. Generally much has been done to create the necessary conditions for successful implementation of gender equality and non-discrimination priority in absorbing the EU Structural Funds in Lithuania over the period of 2007-2013. Much more could be done to translate broad and specific objectives into national management, administration, monitoring, evaluation practice, and effective actions and gender equality competence building at the project implementation levels.

Keywords: equal opportunities, gender equality, gender mainstreaming, structural funds, effects.

Introduction

Unequal gender relations that leave women in a subordination position to men prevail and continue to be the norm rather than exception. Gender hierarchies can be seen in a range of sexual division of labour which is the cause of further unequal power relations. Consequently a certain type of social order is produced, and specific perceptions about gender are

translated into particular social, political and economic arrangements in which women tend to be in unequal position. Economic frameworks assume the behaviour of the individuals to be rational, self-interested, and market oriented. This individual is presumed to have no gender, no socioeconomic status, no age or ethnicity and to live outside of any particular historical, social and geographical context. As a result, the differences between women and men go unrecognized in the aspect of gender – there are neutral, broadly applicable policy objectives and instruments.

Consequently, financial tools have inherited the gender-blind nature of economic models, addressing the needs of everyone in a uniform way. The EU Structural Funds (SF) of any government is the technical instrument by which commitments should translate into monetary terms, and reflects government's policy priorities. While national programs or SF have been instrumental in transmitting and reproducing gender biases, they also offer a possibility for transforming existing gender inequalities.

Research problem and relevance. The General Regulation on the SF for the period of 2000-2006¹ contained substantially new features on integration of equal opportunities for women and men. Nevertheless, the theme of "equal opportunities" has tended, in the last years, to focus on the relative position between women and men. The European Council (1998) has declared on several occasions that the promotion of the principle of equality between men and women is, along with the struggle against unemployment, a fundamental task the EU and Lithuania face. Within the SF, the theme of equal opportunities has grown in importance. Equality between women and men is a basic democratic principle enshrined in the Treaty since 1957. The Amsterdam Treaty strengthened the provisions on equality between women and men: the

¹ Council Regulation (EC) No. 1260/1999 of 21 June 1999 laying down general provisions on the Structural Funds, O. J., 26/6/99, L161/1. COM (96) 67 final.

EU is committed to eliminating inequalities and to promoting equality between women and men in all its activities. Considering a gender dimension in all activities stresses the importance of the fact that gender equality is not a question of minor socio-economic discrepancies². The promotion of equal opportunities for each gender is recognized for its ability to contribute towards socio-economic development in general and regional readjustments in particular. The direction of causality goes mainly from economic growth to gender equality: a better economic performance is usually followed by better education, democracy and greater gender equality. Wide European research in the study of gender mainstreaming use in the SF by Calmfors, 1994; Braithwaite, 1999, 2000; Horelli and Booth, Gilroy, 1998, 2000; Oliva, Pesce, Samek Lodovici, 1999; Fellini, Oliva, Pesce, Samek Lodovici, 2002; McGilloway, 2001; Lofstrom, 2001; Samek Lodovici, 2003; Pellegrin, Vignetti, Givone, Fellini, Pesce, Samek Lodovici, Beltrametti, Villa, 2007, etc. expressed a positive link from greater gender equality to economic growth: increased female participation in the labour market helps to increase gross domestic product as more human resources are involved in the production system. Bearing in mind that Lithuania has absorbed the first portion of the SF of the period of 2000-2006, the following important research problems are defined by such questions: what is the promotion of equality between woman and man, what is the progress in reducing gender inequality? How are gender equity, accountability, transparency, efficiency and effectiveness reached? What are the main recommendations for a more effective implementation of the equality between women and men in the 2007-2013 programming period?

Research subject: contribution of 2004-2006 SF to the promotion of equality between women and men in Lithuania.

Research aim: to evaluate impact of SF programmes in Lithuania in 2004-2006 on gender equality and to develop main recommendations for a more effective implementation in the 2007-2013 programming period.

Research objectives:

1. To review of the main EU and national documents, literature and analysis carried out from a gender perspective taking into account research questions.

2. To study, analyse and aggregate the information of the final evaluation and assessment reports on the implementation of the 2004-2006 SPD and evaluation of the horizontal themes in the Lithuanian reports of 2004-2006 SF programmes from the contribution of financing to gender equality promotion in

all priorities and measures of the operational programmes and applied at the project level.

3. To clarify the most important obstacles to the implementation of equality between women and men.

4. To draw up the main recommendations for a more effective implementation of gender equality and non-discrimination in the 2007-2013 programming period.

Research methods and techniques. These include: review of literature and normative documentation, overview of social surveys, analysis of administrative data and secondary data of SPD. Methods appropriate for the evaluation of equality between women and men are likely to be different at macro and micro level. Quantitative techniques were useful at a macro level, whereas an in-depth evaluation of outcomes, impacts and good practices / personnel experiences required use of qualitative techniques. Qualitative desk research was used as appropriate to assess final outcomes through desk research to arrive at a qualitative judgment with regard to how effectively the 2004-2006 SPD has been performed when implementing gender equality between women and men in Lithuania. More deeply the analysis is carried out through the review from a gender perspective, programmes and available secondary material, such as national and EU-wide evaluations, monitoring and planning documents. The desk research was based on the analysis of secondary sources: the quantitative and qualitative evaluation reports, surveys such as contents of good practice descriptions, evaluation surveys by the SPD projects managers and administration, independent evaluations by experts, analysis of national, SFMIS (Structural Funds Management & Information System) data³ and Eurostat statistics, the analysis of gender equality indicators and monitoring information, the analysis of expenditure categories and financial data on the delivery and use of structural budgeting. The used qualitative content analysis and procedures of textual material were parts (analytic unit) relevant to answering the research question (aiming to implement equal opportunities as the main, keeping *status quo*, positive or neutral impact on the equal opportunities)⁴. In this analysis we saw how gender equality can contribute to economic development in a number of ways: firstly, through quantitative improvements in female participation, as envisaged in the SPD strategy, but also through qualitative improvements in terms of the effective use of their investment in human capital; secondly, in women's contribution to growth through greater economic independence and their contribution as consumers of

² COM (2001) 773 final
COM(2003) 98 final.

³ SFMIS. Available online at http://www.finmin.lt/web/finmin/sfmis/2004_2006.

⁴ Flick, U. (1998). *An Introduction to Qualitative Research*. London: Sage Publications.

goods and services; thirdly, in the integration of women into the fiscal system as net contributors to the welfare state.

The first part of the article illuminates the changes in gender equality situation in Lithuania with the focus on policy tendencies that are performed by SF financing. The second part presents the applied theoretical approaches and research methodology. The third part deals with the research results and discussion of the empirical data. The main recommendations for absorbing the EU SF in Lithuania during 2007-2013 are given.

Policy Analysis for Equal Opportunities Complexity

Equal opportunities are a complex policy area and nowadays require a network approach as most policies are implemented through networks (Kickert, Klijn, Koppenjan, 1997). Approaches that start from the conceptual framework of policy analysis are likely to be particularly useful in understanding the complexities associated with equal opportunities and mainstreaming policies. Policy analysis has been developed in the conceptual context known as 'incremental theory', which is based on the following premises: 1. Public policy is a response to a given problem. 2. There are a number of different actors (community policy) with similar aims who create a level of interplay leading to a common decision; these interactive mechanisms are those which determine the policy, so that it is important to take into account the logic behind the actions of each actor, their interests, their positions, their resources and so on. 3. These decisions can be described as 'incremental', that is they are potentially always feasible and the decision makers, instead of pursuing an ideal model in an abstract manner, seek constantly to improve their own concrete position.

Policy analysis is characterized by contributions from different disciplines (economics, political sociology, policy science, and econometrics). It is particularly suited to complex programmes with a multiplicity of actors. Since development of equal opportunities depends on a large number of variables, many of which are connected with values and behaviours, understanding the policy processes can help to identify the variables worth particular attention.

The policy analysis approach is essentially a 'bottom-up' approach, i.e. it starts with the implementation process and implementation mechanisms. In the first instance, the elements that have determined the results and effects of a policy are identified and analyzed. Secondly, the extent to which these elements have been determined by the actors, by the interaction between actors, or by external factors, is con-

sidered. In short, the bottom-up approach starts from the impacts and the results obtained by the policy and then retraces the policy back to the initial formulation phase via an analysis of the administrative management process and the interaction of the actors. The aim is to analyze the causes of such behaviour and to verify how far the results, at a given point, have satisfied the goals set in the planning phase in our case for evaluation of impact on gender equality. Working from the bottom upwards enables examination of the capacity or scope of administrative units to change inputs to outputs, as well as original policy decisions in order to determine the extent to which they (in terms of goals, standards and resources) have influenced the results obtained. Retracing Structural Funds policy from the bottom to the top (and therefore starting from the results), makes it easier to understand which elements in the SPD affect policy efficiency positively, negatively or simply have no influence at all when reaching equal opportunities objectives in the case of Lithuania.

In this way it is possible to identify how closely SF policy results and impacts on equal opportunities are linked to the implementation process and thus, when it comes to an evaluation, how they must be kept together, summarized from a quantitative point of view in the monitoring system and from a qualitative point of view in the organizational and procedural methodologies used by the same implementation process.

Approaches Addressing Equal Opportunities and Gender Equality by Mainstreaming in the Use of Structural Funds during the Programming Period of 2004-2006

The principle that the European Structural Funds should contribute to the objective of equal opportunities for men and women in the labour market has existed in Community legislation since 1988. Prior to this, the European Social Fund had, since the reform of 1977, been financing vocational training and employment schemes for women as part of its general policy. The Council Regulation of 1988 proposed a specific measure for the promotion of equal opportunities for men and women in the labour market. In 1999 the Council Regulation laying down general provisions on the SF was approved. This contains substantially new features on the integration of equal opportunities for women and men, which should be taken into account in the preparation and implementation of Structural Fund programmes for the new objectives by the EU regions and Member States. If followed by the Member States and regions which manage Structural Funds programmes, the requirements

should lead to a major change in the scope of application of gender equality in public programmes, not only extending the application of equal opportunities within traditional areas such as employment, but also to relatively new areas such as structural investments, industrial development and urban regeneration. Requirements for gender equality in the general provisions of the SF for the programming period of 2000-2006 and technical document on mainstreaming equal opportunities for women and men in SF programmes include the following: to contribute to the elimination and reduction of inequalities and promote equality between men and women, to monitor indicators broken down by sex. In the same programming period, equality between men and women was mentioned in several paragraphs of the preamble of the General Regulation⁵ and in several core provisions⁶. Regulation stated that “<...> the Community shall contribute to <...> the elimination of inequalities and the promotion of equality between men and women”. The provisions for non-discrimination appeared in the preamble⁷, while the main text emphasized that a new initiative (EQUAL) is to be created to combat “all forms of discrimination and inequalities”.

While during the programming periods of 2000-2006 there were some important references to non-discrimination and gender equality, Article 16 brought various important aspects together. Moreover, in the area of gender equality it provides for what is often referred to as a “general call for gender mainstreaming”, “holistic” or “integrative”⁸ approach. Such an approach is visible, first and foremost in the indication that “integration of the gender perspective is promoted during the various stages of implementation of the Funds” (Danish Technological Institute, 2005). As mentioned, this implies that specific and targeted measures to improve the situation concerning gender equality are not enough.

European Structural Funds have taken on board the “gender mainstreaming” approach. Nevertheless, the theme of “equal opportunities” has tended, in the last years, to focus on the relative position between women and men. Within the SF, the theme of equal opportunities has grown in importance. The European Council has declared on several occasions that the promotion of the principle of equality between men and women is, along with the struggle against unemployment, a fundamental task the EU and Member States, including Lithuania⁹, face. There have be-

en a number of definitions of the main concepts, therefore for the purpose of evaluation we will briefly review them.

Equal opportunities for men and women are defined as “equal access for women and men to employment, at the same level of remuneration and social advantages, in a given socioeconomic context”¹⁰. This impact relates to the principle of equal rights and equal treatment of women and men. The principle of equal opportunities may require unequal treatment to compensate for discrimination”¹¹. “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”¹².

Gender mainstreaming is a policy approach that aims at integrating a gender perspective into every policy and into every step of policy processes, from design to implementation, monitoring and evaluation. It is based on the recognition that women and men do not have the same resources, needs and preferences and that many structures, systems and policies are not gender neutral, but treating men’s experience as the norm. Equal opportunities between men and women and the gender mainstreaming principle are expressly indicated in the Regulations of the SF as transversal dimensions of the policy programming and implementation.

Gender mainstreaming is a contested concept and practice. It is the re-invention, re-structuring, and re-branding of a key part of feminism in the contemporary era. It is both a new form of gendered political and policy practice and it is a new gendered strategy for theory development. As a practice, gender mainstreaming is intended as a way of improving the efficiency of mainline policies by making visible the gendered nature of assumptions, processes, and outcomes. As a form of theory, gender mainstreaming is a process of revision of key concepts in order to grasp more adequately a world that is gendered, rather than the establishment of a separatist gender theory. Gender mainstreaming encapsulates many of the tensions and dilemmas in feminist theory and practice over the last decade and provides a new focus for debates on how to move them on (Acker, 1990, Beveridge, Nott and Stephen 2000; Behning and Pascual 2001; Mazey 2000; Verloo 2001, 2003; Walby 2001,

⁵ Council Regulation (EC) No. 1260/1999 of 21 June 1999 laying down general provisions on the Structural Funds, O. J., 26/6/99, L161/1.

⁶ Articles 1, 2, 8, 12, 29, 41, 46 of Council Regulation (EC) No. 1260/1999.

⁷ Whereas 5 of Council Regulation (EC) No. 1260/1999.

⁸ Gender Mainstreaming in the Use of Structural Funding (2007), p. 52.

⁹ LRV nutarimas Nr. 1166. Valstybes zinios, 2003, Nr. 88–3999; LR finansu ministerija (2007). ES programu Lietuvoje vertinimo gaires. Vilnius.

¹⁰ EVALSED: The resource for the evaluation of Socio-Economic Development. Available online at http://www.eagrants.bg/docs/guide2008_evalsed_en.pdf.

¹¹ See glossary: http://ec.europa.eu/regional_policy/sources/docgener/evaluation/evalsed/glossary/glossary_e_en.htm#Equal_opportunities.

¹² Conceptual framework, methodology and presentation of good practices. Final report of Activities of the Group of Specialists on Mainstreaming (EG-S-MS). Strasbourg, 2004.

2002, 2004; Woodward 2001, 2003).

Promoting gender mainstreaming is not only a formal requirement (Rees, 1998, 2007; Lombardo, and Meier, 2006; Stratigaki, 2005; Polverari and Fitzgerald, 2002). It is important because of the strong positive correlation that emerges between economic growth and gender equality. The direction of causality goes mainly from economic growth to gender equality since a higher economic level is usually followed by increased education, democracy and greater gender equality. But there is also a positive link going from greater gender equality to economic growth: increased women's participation in the labour market augments gross domestic product as more human resources are involved in the production system. The inclusion of women in the labour market and in policy-making also contributes to an increase in the quality of life and in future growth due to their effects on child rearing. There are therefore both equity and efficiency arguments to support gender mainstreaming. Discrimination and segregation entail inefficiency. The benefits for the national economy of eradicating discrimination come from the better utilization of resources which may enhance the competitiveness of the local economy. When the economic role of individuals is defined by gender rather than merit or ability, there is inefficiency with underutilization of the skills of women. Policies to reduce gender segregation in society and the economy may also help to develop a multi-skilled workforce and improve work organization patterns. An increased and egalitarian participation of women in the economy may also improve the family conditions if the shared interest of women and children are supported by policies promoting balance between work and life.

This study tries to outline to what extent the gender mainstreaming dimension has been taken into account in the SF 2000-2006 programming period, with specific attention to Regional Development and Cohesion Funds, in order to highlight policy fields where progress has been made and discover policy fields where progress is slow.

Considering a gender dimension in all activities stresses the importance of the fact that gender equality is not a question of minor socio-economic discrepancies and networked social policy analysis only. The promotion of equal opportunities of genders is recognised for its ability to contribute towards socio-economic development in general and regional readjustments in particular.

Research Methodology

Methodology inspired to use cross-sectional research on representation of gender in Single Program-

ming Document of Lithuania (SPD) evaluation reports. Even Hopwood (1996) mentioned under-researched documents from the gender perspective. Reports are interesting study objects in that respect, since they provide an entrance into the network of inter-relationships of organizations and their workforces, target groups as customers, suppliers, governmental officials, men and women (Kleinberg-Neimark, 1992, 1997). Inequality in the portrayal of men and women in reports of projects and programmes communicates traditional gender relations and may reinforce differences in opportunities for the men and women within different social settings of projects. We examine how these corporate publications, reports contribute to gender equality through representation of women and men, femininity and masculinity in the texts, figures, and women visibility by the implemented projects and programmes of SPD in Lithuania. Secondly, we build on notions about the nature, place and function of the information in final reports stemming from the critical accounting. The problem of linking policies, programmes and specific interventions or projects is a perennial one in evaluation of situation of women and men. Thematic evaluations and criteria derived from policies when applied to programme material are common ways of introducing a policy level dimension into evaluation. This reflects a willingness of policy makers to take on board evaluation results. At the same time it presents challenges for evaluators who need to view the results of their work in a wider context. Considering the policy level can also strengthen programme evaluation, for example by identifying results-oriented criteria for programme success. There is therefore a need for evaluation to address the policy level, while drawing evidence from the level of the intervention area.

The implementation of the SPD for 2004-2006 was approved¹³ and EUR 895 million have been made available to Lithuania for the above-mentioned period from the EU Structural Funds. The SPD specified forth the action plans and the development strategy of the EU Structural Funds and Lithuania.

In order to grasp the complex and dynamic meaning and practice promotion of gender equality as it interacts with other grounds of equal opportunities (such as age, ethnicity, sexuality, socioeconomic status, etc.) in implementation of SPD sector-based measures, the analysis was carried out through the review, from a gender perspective, of available secondary material, such as national government reports, evaluations, monitoring and planning documents, which allowed for an extension of the analysis to other areas aiming to identify outputs, results and impacts for women and men during the period of 2004-2008. The

¹³ European Commission Decision C (2004) 2120 of 18 June 2004.

SPD established five investment priorities: development of social and economic infrastructure, human resource development, development of manufacturing sector, rural and fisheries development, and technical assistance. From all these 5 priorities the evaluation of final reports of 636 projects; EC initiative EQUAL external reports of 2006, 2008, reports on implementation of EQUAL Community initiative programmes of 2005, 2006, 2007, and Evaluation of the Horizontal themes in the Lithuanian 2004-2006 SF Programme and Planning for the Period of 2007-2013 were examined. Research on representation of gender in financial and social reports is interesting as these reports as study objects provide an entrance into the network of interrelations between organizations and their workforces, inventors, competitors, customers, suppliers, perspective, as confirmed by the work of critical accounting scholars, for instance, Baker and Bettner (1997). And third, we evaluate the horizontal policies in the Lithuanian 2004-2006 Structural Funding. It was mandatory to implement the horizontal themes (sustainable development and equal opportunities) following the requirements of the EU SF. The most common horizontal themes or policies were: information society, sustainable development, equal opportunities and regional development. Equal opportunities were understood not only as equal opportunities between men and women. Another aim was to prevent discrimination on the basis of sex, race, ethnic origin, religion or beliefs, disability, age or sexual orientation. The promotion of equality between

men and women by implementation of the 2004-2006 SPD was stipulated by using the integrated approach – they might be integrated in all priorities and measures of the Operational Programmes and applied at the project level. The differentiated approach was dedicated to specific horizontal individual priorities and measures in the Operational Programmes. Gender equality advancement was assessed in the final reporting and evaluation stage by using monitoring indicators, selection criteria, the administrative system and procedures, and by identifying outputs, results, impacts, unintended consequences and perverse effects in 2008. To properly measure the impact there has been a requirement introduced in the SPD Monitoring System to distinguish the benefit to women and men as part of the provided information about certain core SPD output and result indicators (for instance, created / maintained jobs).

Measuring Gender Equality Effects of Structural Funds

Starting in 2005, as part of SPD implementation efforts were made to secure equal opportunities for men and women and to guarantee to all persons, in particular socially excluded groups, the access to the opportunities offered by the SF. Analysis has demonstrated that financial allocations for the implementation of equal opportunities during the period were low (see table below).

SPD allocations for the projects aimed at assessing the implementation of equal opportunities in absorbing the EU Structural Funds for 2004-2006 in Lithuania

SPD priorities	Number of projects aimed to implement equal opportunities as the main objective	SF contribution in Euro	% of total SF contribution	Number of projects aimed to implement equal opportunities as the main objective and/or positive impact on equal opportunities	SF contribution in Euro	% of total SF contribution
1. Development of social & economic infrastructure	261	21 098 584	1.73	535	278 881 372	22.93
2. Development of human resources	83	16 210 402	1.33	575	187 899 562	15.45
3. Development of manufacturing sector	11	18 242 171	1.5	203	284 423 390	23.38
4. Rural & fisheries development	49	3 312 868	0.27	1234	132 340 736	10.88
5. Technical assistance	0	0	0	97	26 994 526	22.2

Source: produced by Sidlauskienė with reference to SMFIS data

Bearing in mind the mandatory implementation of the sustainable development and equal opportunities (as horizontal themes) satisfying the requirements of the EU SF and national regulation, but such low financial allocations, we find out:

1. The coherence between the aims and objectives regarding equal opportunities described in the 2004-2006 programming documents and the aims and objectives of national documents was ranked as low. This is associated with some legislative gaps as well as the lack of integration of national strategic objectives into the EU SF documents. Changes in the national legislation were not integrated during the implementation of the SPD. First of all the Law on Equal Treatment (2005) in Lithuania was not integrated in SPD, gendered terminologies in English and Lithuanian languages make sense mismatch what causes misunderstanding of compatibility between the understanding of European and Lithuanian gender sensitive vocabulary, e.g., *gender equality, sex discrimination or discrimination on the grounds of sex, equal opportunities for women and men, equal treatment of women and men, gender mainstreaming, gender impact assessment. Equal opportunities of genders* in the national legislation do not correspond to the meaning of equal opportunities between women and men in respect of the Law on Equal Opportunities for Women and Men (1998).

2. The aims of equal opportunities in horizontal policy were too narrow. Therefore integrated implementation of priority of equal opportunities was linked to the access of both men and women to participation in project activities and to equal numbers of women and men among the beneficiaries in projects. Contents and indicators of equal opportunities were not clearly defined in all structural support means with the exception of Priority 2. *Development of Human Resources* while the largest financial resources and the biggest impact on the equality between women and men were in the measures 2.3. *Prevention of Social Exclusion and Social Integration*; 2.5 *Improvement of Human Resources Quality in Scientific Research and Innovations* and 4.6 LEADER+ type measures. 2.3 measures were as individual priority and measure in the Operational Programmes with the specific differentiated approach. But the negativism of such measures was traditionally identified with the social risks, which as a rule particularly affect women.

3. It was not possible to assess the impact of implementation of SPD in equality between women and men on sector-based measures: transport, energy, environmental protection, health care, tourism, industry and business. The importance and implementation of equal opportunities in sector-based measures were not accepted. It was found that the expenditure devoted to the horizontal themes of equal opportunities

for implementation of the measures was only 4.84%. This priority had the lowest part in the costs of the horizontal priorities (compare with 33.33% for regional development). It can be argued that the planned allocation of support to equal opportunities indicator was not given because much more attention was paid to administration of project implementation.

4. As to 4.84% allocation of resources for the equality it can be argued that the planned allocation of support to equal opportunities indicator was not made. Absorption could complicate the unrecognized content of equal opportunities and potential integration into the project concerned. Inability to integrate gender equality into projects and programming measures can be assumed.

5. In quantitative terms financial input made a greater impact on equality between women and men and social integration of persons with disabilities. The main indications within the equal opportunities theme which have received particular attention included: participation in labour market, different pay-rates and unemployment in all age groups (especially long-term unemployment). The growth of the number of the employed is first of all attributable to the absorption of the EU SF and job creation. The level of employment among women aged 15 to 64 has increased. In 2005, women accounted for 49.7% of the total employed. The level of employment among women has since 2004 surpassed the 57.2% target set by the EU for 2005 and reached 59.4%. The employment rate of women aged 15-64 increased from 61% in 2006 to 62.2% in 2007 (that of men, respectively, from 66.3% to 67.9%) and there was **9.1 point increase in the employment of 55-64 year old women in 2004-2006**. However, the men-to-women ratio varies from sector to sector. Women continue to dominate education, where they account for 79% of those employed in this field. In 2005, 1.8 times more women than men worked in the public sector, and 1.3 times more men than women worked in the private sector. Men dominate among employers and self-employed (over 62%); as regards those working for employers, the distribution of men and women is almost equal. A shortage of many professions and a demand for particularly high skills has induced a quite rapid growth of employment among older population (aged 55 to 64).

The female employment rate remained lower than the male one by 6 points. The **female labour force activity rate in 2007 increased to 65%, the male one – to 71%** (in 2006 – 64.8 and 70.5, respectively). **Unemployment rate of women dropped from 13.2% to 5.1%** (that of men, respectively, from 12.8% to 5%) during the period of 2004-2006. In 2007, the **female and male unemployment rates were the same – 4.3%**.

In 2007 the number of women working part-time was 77.1 thousand, which comprised 10.2% of all employed women (that of men – 7%).

Average gross hourly earnings were applied at the stage of the calculation of a gender pay gap by the methodology of Eurostat. In 2007, average gross hourly earnings of women in the whole economy (individual enterprises excluded) made LTL 10.37; in comparison to 2006 they increased by 16.4% and were by 19.3% lower than those of men; in the public sector they made LTL 11, or 14.5% more than in 2006, in the private sector they made LTL 9.83, which was 19.2% more than in 2006. Average gross hourly earnings of men in the whole economy (individual enterprises excluded) made LTL 12.85; in comparison to 2006 they increased by 20.9%.

6. The measure 3.3 *Development of Information Technologies, Services and Infrastructure* of horizontal priority *Information Society* increased the target group of women in computer literacy apparently.

7. Nevertheless, other groups committed to ensuring equal opportunities had low impact, which was not as defined in national programming documentation. The coherence of aims and objectives described in the 2004-2006 programming documents with the aims and objectives of national documents was ranked as *low/partial* only. This is related to some legislative gaps as well as the lack of integration of national strategic objectives into the documents of EU funds. More professional preparation for successful implementation during the programming period of 2007-2013 should be drafted in the programming, implementation and evaluation stages: monitoring indicators, selection criteria, and the project implementation and administration system. Greater awareness of policy- and decision-makers, social partners, institutions, NGOs, networks regarding equality between women and men is expected in relation to 2007-2013 policy areas. The above-mentioned show that the inclusion of mainstreaming policies in the Structural Funds should be perfected and strengthened in the perspective of the next period.

Conclusions

1. Several provisions in the General and National Regulations provide for that in all its activities the state shall aim to eliminate inequalities, and to promote equality, between men and women (through gender mainstreaming), in Structural Funds as well. From an early stage, socio-economic development programmes need to demonstrate results. At the earliest stages this is likely to take the form of outputs.

2. Summing up the qualitative impact of the SPD on equality between women and men, there was little impact on equal opportunities in the case of Lithuania. The main problems here, as in other member states, are related to some difficulties that have characterized gender mainstreaming in the 2000-2006 programming such as a still present confusion as to the actual meaning of gender mainstreaming, too often interpreted as the mere promotion of positive actions or social integration, the lack of adequate instruments and dedicated resources (human and financial) for the effective implementation of gender mainstreaming and the operational difficulty of putting into practice gender mainstreaming in development policies that are not directly addressed to individuals or social groups.

3. The lack of revised guidance for measuring gender equality effects of Structural Funds complicated the monitoring, evaluation and accountability of key indicators and context indicators in Lithuania as well in other EU member states.

4. Lithuania learned lessons from the programming period of 2000-2006 on the contribution of the Structural Funds to greater equality between women and men as new social horizontal transversal or differentiated policy and indicated suggestions for further supporting of equality between women and men for the 2007-2013 financing period.

Recommendations

The financial and economic crisis has taken a heavy toll on public finances, businesses, employment and households in Lithuania. In developing a new vision and direction for EU policy of absorbing the next portion of Structural Funds in the period of 2007-2013 it is necessary to recognise better governance of gender equality and non-discrimination. Suggestions for further supporting gender mainstreaming indicate the following dimensions as priorities: building of gender equality and non-discrimination governance; improvement of management and implementation skills; improvement of monitoring and evaluation tools; supporting institutional learning through cooperation and exchange of good practices as a key tool to successfully promote institutional learning across and within states with explicit reference to gendered programming and implementation of projects; improvement of communication strategies to increase the awareness among all key players and to emphasize gender issues and programme achievements, including the socio-economic role of women and men.

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Lietuvos 2004–2006 m. struktūrinės paramos poveikio lyčių lygybei užtikrinti įvertinimas

Santrauka

Kol kas stokojama išsamių analitinių ir įvertinamųjų moterų ir vyrų (lyčių) dalyvavimo Lietuvos ekonominiame, politiniame, socialiniame, moksliniame, kultūriniame gyvenime metodikų, poveikio lyčių lygybei vertinimo metodikų, poveikio moterims ir vyrams atskaitos modelio (lyčių analizės modelio), todėl gana sunku atlikti empiriškai pagrįstą kokybišką struktūrinių fondų (SF) poveikio lyčių lygybės įtvirtinimo situacijos analizę.

2000–2006 m. SF pagrindinio reglamento išskirtinis bruožas – moterų ir vyrų lygių galimybių integravimas.

Europos sąjungos (ES) ir Lietuvos techniniai dokumentai pateikia moterų ir vyrų lygių galimybių integravimo reikalavimus SF planuose ir programose, taip pat patarimus, kaip šie reikalavimai galėtų būti taikomi praktiškai, kaip jie galėtų būti plėtojami ir įgyvendinami.

Lyties aspekto integravimas SF turėjo tikslą – sutelkti pastangas ir padėti įveikti egzistuojančią nelygybę tarp moterų ir vyrų šalyse narėse. Nors nelygybės lygis šalyse narėse yra skirtingas, tačiau ryškiausia nelygybė matuojama tokiais rodikliais: moterų ir vyrų aktyvumo lygis,

užimtumo lygis ir nedarbo lygis; moterų ir vyrų, dirbančių visą ar ne visą darbo dieną ar netipišką darbą, dalis; darbo užmokestis ir užimtumo sąlygos; moterų sukurtų ir vadovaujamų bei plėtojamų verslo įmonių skaičius; moterų ir vyrų galimybės pasinaudoti transportu ir kitomis paslaugomis; pasidalijimas neapmokamais namų ūkio darbais ir šeimos priežiūros pareigomis.

Tyrimo *tikslas* – SF naudojimo poveikio lyčių lygybės politikos įtvirtinimui Lietuvoje, siekiant ES lyčių lygybės strateginių tikslų analizės atlikimas, išvadų ir rekomendacijų parengimas. Tyrimo *uždaviniai*:

1. Išanalizuoti pagrindinius ES ir Lietuvos dokumentus, gerą patirtį, įvertinimo ataskaitas ir literatūrą moterų ir vyrų lygybės įtvirtinimui pasiekti, įsisavinant struktūrinę paramą.

2. Išanalizuoti Valstybinės moterų ir vyrų lygių galimybių programos tikslų, uždavinių ir rodiklių uždavinių atitiktį pagrindiniams ES ir nacionaliniams dokumentams bei atlikti moterų ir vyrų lygybės būklės įvertinimą įgyvendinus pirmąjį BPD¹⁴.

3. Surinkti, susisteminti, išanalizuoti ir apibendrinti informaciją apie Europos socialinio fondo paremtų projektų pagal BPD 2.1, 2.2, 2.3 priemones ir horizontaliosios lygių galimybių prioriteto įgyvendinimo rezultatus, apimant tiek projektus, skirtus lyčių lygybės tematikai, tiek kitus projektus, kuriuose buvo privaloma integruoti lyčių aspektą.

4. Remiantis apibendrinamuoju vertinimu ir siekiant patobulinti atskirus programos įgyvendinimo aspektus ar įvertinti gerą ir blogą praktiką, išnagrinėjus įgytas praktikas ir pamokas, pateikti rekomendacijas, rengiant naujų programų / projektų 2007–2013 m. perspektyvai įvertinimą lyčių lygybės ir nediskriminavimo požiūriu.

Tyrimo metodika: 1) pagrindinių tyrime vartojamų terminų identifikavimas, tikslinimas nustatant ES ir Lietuvos sampratų atitiktis, pasitelkiant struktūrinės paramos vertinimo lyčių lygybės požiūriu teisinio pagrindo ES ir Lietuvoje analizę; 2) kokybinis antrinis pirminių šaltinių analizės būdas, t. y. apibendrinamasis vertinimas ar tematinis (moterų ir vyrų padėties gerėjimo ar blogėjimo) vertinimas yra skirtas konkrečiai temai programose / projektuose įvertinti remiantis antrine šaltinių analize. Pirminiais apibendrinamojo vertinimo šaltiniais pasitelkti horizontalių prioritetų įgyvendinimo (2008), EQUAL programos Lietuvoje 2004–2008 m. nuolatinio vertinimo, Lietuvos 2004–2006 m. BPD 2 prioriteto „Žmogiškųjų išteklių plėtra“ 2.1, 2.2, 2.3, 2.4, 2.5 priemonių metinės ir galutinės įgyvendinimo ataskaitos.

Apibendrinant 2004–2006 m. ES struktūrinės paramos 4,85 proc. lėšų indėlių į lygių galimybių įgyvendinimą, galima teigti, kad sprendžiant pagal skirtos paramos apimtį, t. y. vertinant kiekybiškai, daugiau įtakos daroma vyrų ir moterų lygių galimybių (ypač kompiuterinio raštingumo) bei neįgaliųjų socialinės integracijos srityje. Tuo tarpu kitų grupių lygių galimybėmis užtikrinti padarytas nedidelis poveikis, kuris ir nebuvo tiksliai apibrėžtas strateginiais dokumentais. Kokybiniu požiūriu padarytas nežymus poveikis lygioms galimybėms įtvirtinti Lietuvos visuomenėje:

1. Įgyvendinant lygias galimybes diferencijuotai, labiau orientuotasi į socialinės rizikos grupes, daugiausia

daromas poveikis pačioms moterims, o ne sprendžiamos konkrečios aktualios problemos, susijusios su struktūrinėmis lygių galimybių kliūtimis. Įgyvendinant lygias galimybes integruotai, kaip rodo vertinimo ataskaitos ir BPD priemonių poveikio lygioms galimybėms aprašymai, dažniausia apsiribota nekonstruoti tiesioginės diskriminacijos.

2. Pagal konteksto rodiklius BPD įgyvendinimo laikotarpiu mažėjo lyčių atotrūkis darbo rinkoje, tačiau išliko aktualūs lygybės įgyvendinimo klausimai švietimo, sveikatos apsaugos, atstovavimo srityse. Mažėjo nedarbo lygis, skirtumai tarp vyrų ir moterų nedarbo lygio. 2003 m. pirmąjį ketvirtį moterų nedarbas buvo 2 proc. mažesnis nei vyrų. Įgyvendinant BPD, jie išsilygino, moterų nedarbo lygis tapo šiek tiek didesnis nei vyrų. Padidėjęs moterų užimtumo lygis viršijo Lisabonos strategijoje nustatytą moterų užimtumo rodiklį 2010 m. (60 proc.). Lyginant su kasmetinėje ES lyčių lygybės ataskaitoje pateikiamais kitų ES šalių duomenimis, pagal moterų ir vyrų užimtumo lygio skirtumą Lietuva iš ketvirtosios pakilo į trečiąją vietą, pagal nedarbo lygio skirtumą – iš aštuntosios į šeštąją. Tarp ilgalaikių bedarbių daugiausia moterų ir vyresnių kaip 50 m. asmenų. Moterys sudarė beveik 70 proc., o vyresni nei 50 m. asmenys – 51 proc. ilgalaikių bedarbių.

3. Lietuva, lyginant su kitomis šalimis, taip pat padarė didelę pažangą dėl vyrų ir moterų atlyginimų skirtumo mažėjimo, tačiau skirtumai išliko, horizontali ir vertikalė profesinė segregacija gąji. Moterų atlyginimo vidurkis mažesnis nei vyrų ir BPD įgyvendinimo metu privačiame sektoriuje mažėjo. 2000 m. moterys atlyginimas privačiame sektoriuje sudarė 84,5 proc. vyrų atlyginimo, tuo tarpu 2006 m. – 80,9 proc. 2006 m. moterys daugiausia dirbo tokiose tradiciškai moterims priskiriamose srityse kaip švietimas, sveikatos, socialinė, komunalinė priežiūra, aptarnavimo sektorius.

4. Turint omenyje, kad 2004–2006 m. BPD programavimo planavimas vyko 2002–2003 m., BPD tikslai lygių galimybių srityje apima lygių galimybių užtikrinimą, didinant vyrų ir moterų lygias galimybes ir socialiai atskirtų grupių galimybes tapti ar išlikti aktyviais socialinio ir ekonominio gyvenimo dalyviais.

2005 m. įsigaliojęs Lygių galimybių įstatymas išplėtė diskriminacijos sampratą tikslinių grupių atžvilgiu, nors anksčiau rengtas ir patvirtintas BPD iš dalies atitinka šį įstatymą, todėl parama nebūtinai turėjo būti skiriama visoms jame numatytoms tikslinėms grupėms. Lygių galimybių prioritetas kaip horizontali tema aprašyme susieta su ESF sritimi, todėl iš anksto ji programuota kaip neaktualus traktavimas kitose srityse. Tačiau kitų prioritetų atžvilgiu ši horizontali politika pagal ES iškeltus uždavinius taip pat turėjo būti įgyvendinama. Apskritai lygių galimybių turinys nebuvo pakankamai aiškiai apibrėžtas visose struktūrinės paramos priemonėse, o BPD uždaviniai lygių galimybių srityje tik iš dalies atitiko strateginius ES dokumentus dėl struktūrinės paramos įsisavinimo, neaiškiai formuluota lyčių lygybės, lygių galimybių, lyties aspekto integravimo, poveikio moterims ir vyrams sampratos, neiškelti uždaviniai, kurie spręstų tikslinėms grupėms aktualias problemas. Išryškėjo pagrindiniai lygių galimybių įgyvendinimą matuojančios ir vertinančios metodologijos trūkumai: diskriminaciją patiriančių moterų ar jų grupių indikacijų ir rodiklių stygius; nematuota, kaip tiesioginės ar netiesioginės

¹⁴ BPD – Bendrasis programavimo dokumentas.

tikslinės grupės pasiskirsto pagal kitus požymius; netaikyti specifiniai rodikliai, matuojantys konkrečius lygių galimybių gerinimo siekinius atskirose srityse; trūko konteksto rodiklių ir kiekybiškai išreikštų uždavinių ir pan. Pagrindinė lygių galimybių horizontalaus prioriteto įgyvendinimo kliūtimi tapo menka horizontalių prioritetų svarba, lygybės koncepcijos ir naudos suvokimo trūkumo bei nebuvo reikiamai parengta įgyvendinimo priežiūros ir (į)vertinimo valdymo sistema. Lygių galimybių ir lyčių lygybės politikos įgyvendinimas Lietuvoje yra nauja socialinės politikos sritis, jos nepakankamas suvokimas kėlė problemų. Administruojantis stebėsenos ir valdymo personalas stokojo žinių ir patirties, siekiant pokyčių moterų ir vyrų lygybės skatinimo, stebėsenos ir valdymo praktikoje.

Apibendrinant galima teigti, kad 2004–2006 m. BPD nesušvelnino daugelio aktualiausių problemų, kurių

sprendimas perkeliamas į 2007–2013 m. finansinį laikotarpį. Šiuo laikotarpiu vyrų ir moterų lygybės didinimą ir nediskriminavimą galėtų lemti kokybiškesnis išteklių pasiskirstymas, produktyvus panaudojimas lyčių lygybei įgyvendinti bei veiksmingo poveikio moterų ir vyrų lygybei vertinimo, stebėsenos ir matavimo modelis bei sėkmingesnis ES programų vertinimo organizavimas ir valdymas. Nerimą kelia tai, kad dėl dabartinės ekonomikos krizės lyčių lygybės srities pasiekimai menkės, nes lyčių lygybės užtikrinimo priemonės ribojamos, todėl moterų nuosmukio padarinius pajunta skaudžiau.

Pagrindiniai žodžiai: lygios galimybės, lyčių lygybė, struktūriniai fondai, poveikis.

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